



European Standardization Organizations

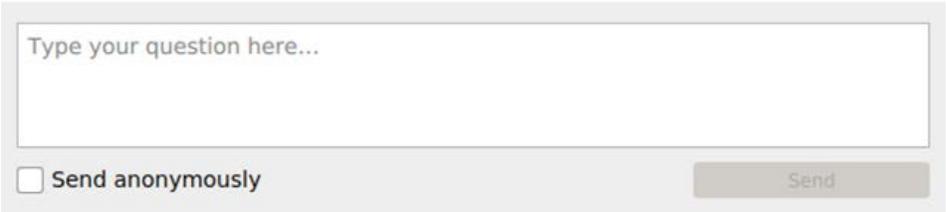
# Webinar: Flexible standards development process Clarifications & improvements

29 October 2020

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# Your speakers today



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- 1. Recap on the standards' development process**
- 2. Clarifying some aspects following technical bodies' feedback**
- 3. Presenting the new changes to the process**

## 1. Recap on the standards' development process

# The *Flexible Standards Development Process* Principles

- ▶ THE PROCESS for standards' development



- ▶ Technical Committees: fully responsible for the **timely** and **effective delivery** of standards

- **autonomy** in planning and organizing their work
- within a specified **maximum timeframe**

► The process is applicable to:

- **any homegrown CEN and/or CLC work items including CEN-CLC JTCs**
- **CEN work items under VA with CEN lead**

Applies also to the candidate harmonized standards and supports TCs to meet the deadlines set in the SReq!

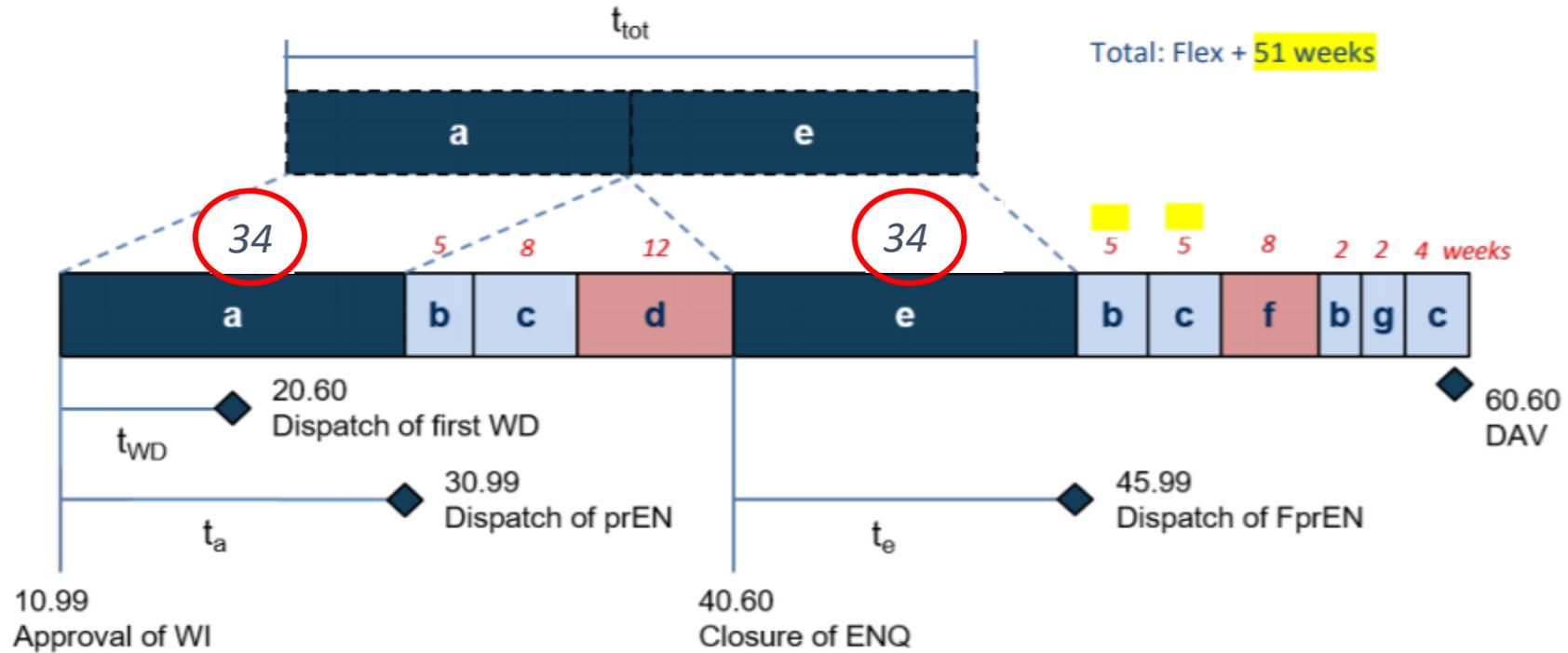
▶ The process is applied to:

→ **Work Items for which the NWI proposal has been prepared and '*launched*' after 1 April 2020 by TCs**

Note: In CLC clock start ticking after CLC/BT green light on the NWI → Consider at least 4 weeks after TC decision to approve the NWI

# From rigidity...

Fig. 1

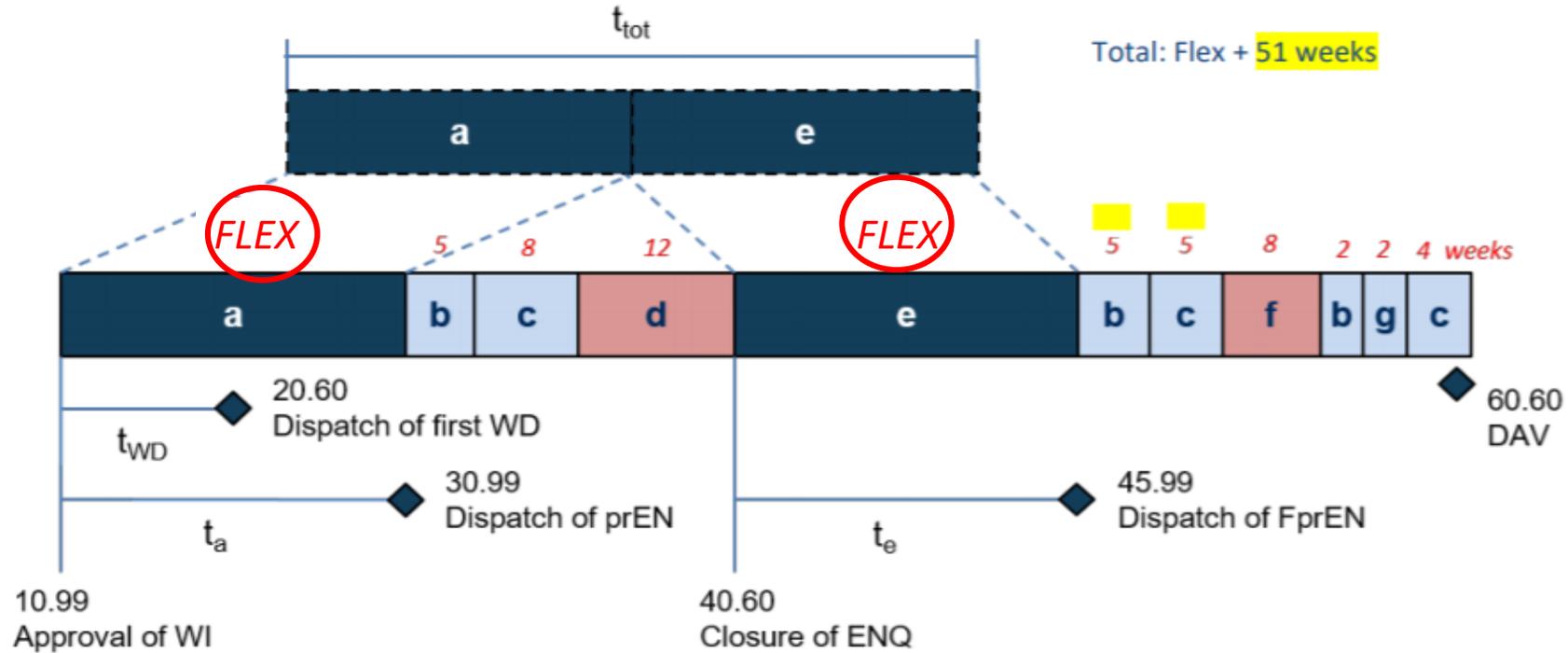


- a Drafting of prEN
- b Editing
- c Translation and preparation of national publication
- d Enquiry
- e Comments handling / preparation of FprEN
- f Formal Vote
- g TC proofing

- Internal process
- Technical work
- Voting

# ...to flexibility

Fig. 1



- |   |   |   |                  |
|---|---|---|------------------|
| a | Drafting of prEN                                    |  | Internal process |
| b | Editing   |  | Technical work   |
| c | Translation and preparation of national publication |  | Voting           |
| d | Enquiry   |   |                  |
| e | Comments handling / preparation of FprEN            |   |                  |
| f | Formal Vote   |   |                  |
| g | TC proofing   |   |                  |



## ► WHAT:

Allocation of time (duration), work item per work item, by indicating the following 3 target dates, in both CEN and CENELEC NWI forms:

- Target date for dispatch of first Working Draft
- Target date for dispatch of ENQ draft
- Target date for dispatch of FV draft

For CLC WIs and CEN-CLC TCs WIs to add the duration expressed in weeks



## ► HOW:

$$t_{a,\min} = 1 \text{ w}$$

$$t_{e,\min} = 6 \text{ w}$$

$$t_{a,\max} = 62 \text{ w} \quad (\text{i.e. } t_{\text{tot}} - t_{e,\min} \leq 68 \text{ w} - 6 \text{ w})$$

$$T_a + T_e \leq 68$$

When planning  $T_a$ , the times for dispatching the first working draft, the ENQ draft, the FprEN are calculated by default:

- $t_e \leq t_{\text{tot}} - t_a \leq 68 - t_a$
- $t_{\text{WD}} = \frac{1}{2} t_a$

## 2. Clarifying some aspects following technical bodies' feedback

## Your questions and doubts

*I was looking up the project planning for the development of prEN 16416 rev. TC189 recently approved a 9 month tolerance request, so I wanted to know what the adjusted timings for the different stages would be.*

*When I looked up data in Projex I was a bit puzzled why the dates provided under 'initial plan' rather seem to reflect the adjusted timings, while the dates under 'adjusted plan' would rather match the original planning, see screenshot below. Could you please let me know if there indeed is a mistake or if I am misinterpreting the planning?*

*Thank you in advance.*

# Your questions and doubts

*I've just tried to check the new timeline in Projex. There is still the alert N° 8?*

*In the adjusted timeline there I can see no change, but in the initial plan the new target is 2021-08-20. This is a bit confusing, why the adjusted plan is not the new one but the initial plan?*

*I kindly ask you if the new tolerance is correctly adjusted to Projex.*

*Thanks a lot*

# **WIs under new (flexible) process problems & solutions**

**At any time before the dispatch for Enquiry, i.e. 30.99 (novelty!),** the TC leadership in cooperation with the relevant WG convenor have at disposal the following options for changing the planning:

- a) To change the planning by using **the 'one change' option**. It requires a TC decision.
- b) To ask for **a tolerance**. It requires a TC decision in CEN and only a TC secretary request in CENELEC, as current practice.



# Current and future impact



- Currently both the “one change” option and the 39 weeks (9 months) tolerance trigger a change in the column Initial plan.
- The column Adjusted plan does not change, because currently it is designed to adjust only when a milestone is realised -> then, when there is a ‘Realized’ date.

Number of months since WI creation/Confirmation: 1

Phase	Event (Milestones)	Stage-Code	Initial plan	Realized	Adjusted plan
Proposal and decision on WI	Proposal of Preliminary WI	00.60.0000			
	Proposal of WI for approval	10.00.0000		2020-07-21	2020-07-21
	Decision on WI Proposal	10.99.0000	2020-09-16	2020-09-16	2020-09-16
Drafting of 1st working doc	Circulation of 1st WD	20.60.0979	2021-02-28		2021-01-13
Consensus and consolidation	Dispatch ENQ draft to CMC	30.99.0979	2021-12-31		2021-05-12
Enquiry	Submission to Enquiry	40.20.0000	2022-04-01		2021-08-11
	Closure of Enquiry	40.60.0000	2022-06-24		2021-11-03
Finalization of draft for FV	Dispatch FV draft to CMC	45.99.0979	2022-09-30		2022-06-29
Formal Vote	Submission to Formal Vote	50.20.0000	2022-11-18		2022-08-17
	Closure of Formal Vote	50.60.0000	2023-01-13		2022-10-12
Finalization of standard	DOR/Ratification	60.55.0000	2023-02-10		2022-11-09
	DAV/Definitive text available	60.60.0000	2023-03-10		2022-12-07
Publication	DOA/Announcement	65.31.0000	2023-06-10		2023-03-07
	DOP/Completion all nat. publ. (M)	65.51.0000	2023-09-10		2023-06-07
Withdrawal of nat. standards	DOW/Completion withdrawal nat.std.	65.62.0000	2023-09-10		2023-06-07
Review	Start of review	90.00.0000	2028-03-10		2027-12-07
	Decision on results of review	90.93.0000			
Review Vote	Submission to Review Vote	90.20.0000			
	Closure of Review Vote	90.60.0000			

# Current and future impact

- It could be misleading for project management of TC leadership



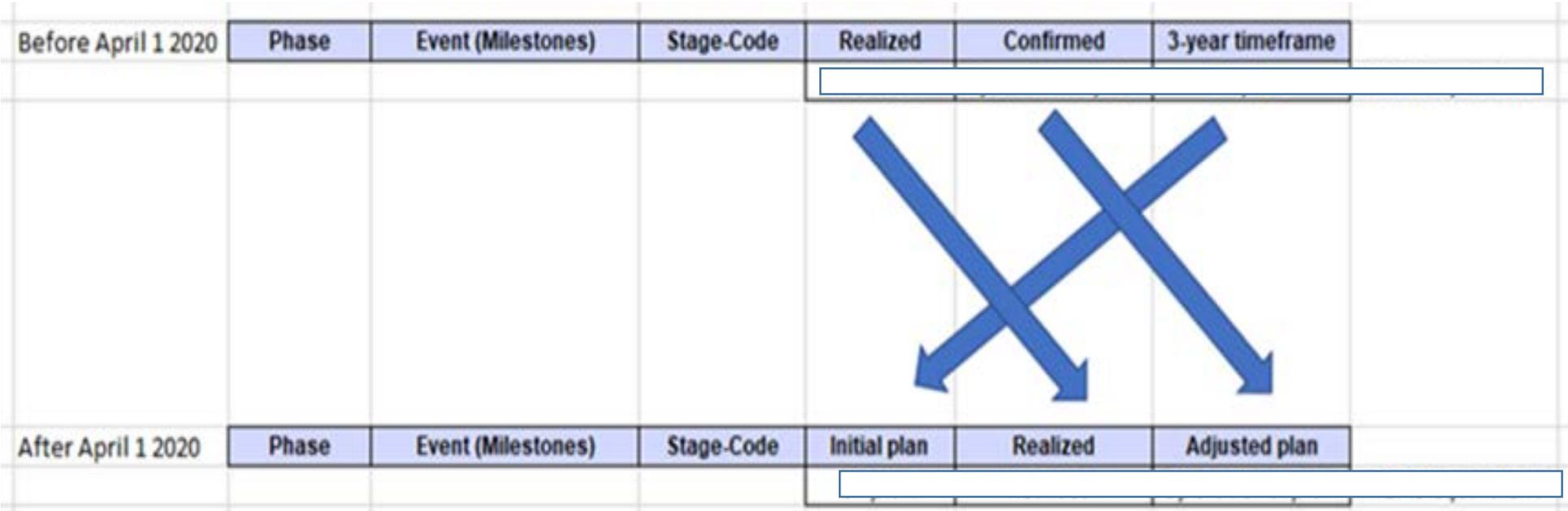
SOLUTION!

1. The 'Initial plan' will NOT change and remain the one defined at the beginning of the planning
2. The 'Adjusted plan' will reflect all changes
  1. Not only those triggered by the 'Realized dates'
  2. But also those triggered by the "one change" option and the 39 weeks (9 months) tolerance

# **WIs not falling under the new process**

## **Problems and solutions**

# Transition in Projex-Online of non-flex projects



# Tolerance in Projex-Online



Number of months since WI creation/Confirmation: 9

Phase	Event (Milestones)	Stage-Code	Initial plan	Realized	Adjusted plan
Proposal and decision on WI	Proposal of Preliminary WI	00.60.0000			
	Proposal of WI for approval	10.00.0000			
	Decision on WI Proposal	10.99.0000	2020-02-10	2020-02-10	2020-02-10
Drafting of 1st working doc	Circulation of 1st WD	20.60.0979	2020-06-10		2020-05-17
Consensus and consolidation	Dispatch ENQ draft to CMC	30.99.0979	2021-07-10		2020-09-17
Translation of draft	Start of draft translation	40.10.6001			
Enquiry	Submission to Enquiry	40.20.0000	2021-09-25		2020-12-03
	Closure of Enquiry	40.60.0000	2021-12-18		2021-02-25
Finalization of draft for FV	Dispatch FV draft to CMC	45.99.0979	2022-08-18		2021-11-01
Formal Vote	Submission to Formal Vote	50.20.0000	2022-12-04		2022-02-17
	Closure of Formal Vote	50.60.0000	2023-01-29		2022-04-14
Finalization of standard	DOR/Ratification	60.55.0000	2023-02-28		2022-05-16
	DAV/Definitive text available	60.60.0000	2023-04-28		2022-07-18
Publication	DOA/Announcement	65.31.0000	2023-07-28		2022-10-18
	DOP/Completion all nat. publ. (M)	65.51.0000	2023-10-28		2023-01-18
Withdrawal of nat. standards	DOW/Completion withdrawal nat.std.	65.62.0000	2023-10-28		2023-01-18
Review	Start of review	90.00.0000	2028-04-28		2027-07-19
	Decision on results of review	90.93.0000			
Review Vote	Submission to Review Vote	90.20.0000			
	Closure of Review Vote	90.60.0000			

# Transition in Projex-Online of non-flex projects

Solution  We follow the principle:

**The 'Adjusted plan' MUST always reflect the latest status of the project, including next stages!**

**SAME solution** for projects under the new process, the 'Adjusted plan' will reflect the changes triggered by the 39 weeks (9 months) tolerance

# Question time



# Reminding planning aspects

## Defining target dates

(clarifications needed!)



# REMINDER – CEN only

## Preparing the New Work Item

- 1) The **Technical Body officers** - TC Chair and TC Secretary in cooperation with WG Convenor - **define the planning** of the project, taking into account TC/WG needs and resources
- 2) **The Secretary allocates** the project's timeframe by indicating the 3 target dates, in the **CEN NWI form** (first Working Draft, dispatch of ENQ draft, dispatch of FV draft)



USE the IT tool in the **Projex-Online Working Area** will help in planning and drafting the NWI!

- 3) The **TC takes the decision** to approve the New Work Item

# Creation of a Work Item - Target dates

17. Please provide the target dates for the below key stages

Stage Code	Stage	Target date
10.99	Decision on WI Proposal	2020-03-04
		+ 17 weeks
20.60	Circulation of 1st WD	2020-07-01
		+ 17 weeks
30.99	Dispatch ENQ draft to CMC	2020-10-28 
		+ 13 weeks
40.20	Submission to Enquiry	2021-01-27
		+ 12 weeks
40.60	Closure of Enquiry	2021-04-21
		+ 34 weeks
45.99	Dispatch FV draft to CMC	2021-12-15 
		+ 8 weeks
50.20	Submission to Formal Vote	2022-02-09
		+ 8 weeks
50.60	Closure of Formal Vote	2022-04-06
		+ 4 weeks
60.55	DOR/Ratification	2022-05-04
		+ 4 weeks
60.60	DAV/Definitive text available	2022-06-01

Project start date:  

Please enter the start date of the project and push on the button 'Calculate target' dates to generate the target dates for the committee plan.

Remark: the dates may still be manually changed after the simulation but cannot go beyond the project end date.

 Editable

Default target dates are proposed by the system, but they can be edited.

 Editable

# Creation of a Work Item – Checks

			+ 8 weeks
50.20	Submission to Formal Vote		+ 8 weeks
50.60	Closure of Formal Vote		+ 4 weeks
60.55	DOR/Ratification		+ 4 weeks
60.60	DAV/Definitive text available		

- Section 9 - Relation with Standardization Request, Directive/Regulation and/or Legislation/Policy
- Section 10 - Intellectual Property Rights (IPRs)
- Section 11 - CEN member commitment and result of vote
- Preview your data
- Review decision reference and submit to CCMC

Save Exit

Work PDF

Previous Next

# ATTENTION! – CENELEC only

▶ Applicable to Work Items satisfying the below condition:

→ **For homegrown European Standards**

Some functionalities of “Working Area” are now open to CENELEC Work Items but these are managed by the **CCMC Data Service Team** ([dataservice@cencenelec.eu](mailto:dataservice@cencenelec.eu))!

# ATTENTION! – CENELEC only

## ► Preparing the New Work Item

- The **Technical Body officers** - TC Chair and TC Secretary in cooperation with WG Convenor - **define the planning** of the project, taking into account TC/WG needs and resources
- The Secretary allocates the project's timeframe by **indicating the duration in weeks for the 3 delivery dates**, in addition to the three targets dates, in the **CENELEC New Work Item form** (first Working Draft, dispatch of ENQ draft, dispatch of FV draft)
- The **TC takes the decision** to start a New Work Item (NWI)
- The NWI form is submitted for **BT approval** by correspondence (4 weeks)
- Once approved by CLC/BT, the dates are encoded by CCMC DATA in the database.

# ATTENTION! – CENELEC only

**New requirement:** express the target dates through a duration, starting with the BT decision:

- 1 WD\_TARGET: BT decision + N weeks
- ENQ\_TARGET: BT decision + N weeks
- FV\_TARGET: ENQ + N weeks

PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	<b>1 WD_TARGET</b>	ENQ (30.99)	<b>ENQ_TARGET</b>	FV (45.99) (EN/HD ONLY)	<b>FV_TARGET</b>
	dd/mm/YY	dd/mm/YY	<b>(XX weeks)</b>	dd/mm/YY	<b>(YY weeks)</b>



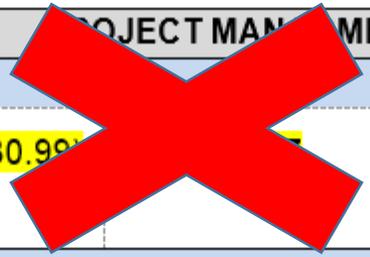
Duration for 1WD is half of duration for 30.99. It could be indicated or will be deduced by 30.99

# ATTENTION! – CENELEC (and JTCs)

PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	2020-01-27 BT approval + 3 weeks	ENQ (30.99)	2020-02-17 BT approval + 6 weeks	FV (45.99) (EN/HD ONLY)	2020-11-17 12 weeks
Drafting Body					



PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	2020-01-27	ENQ (30.99)		FV (45.99) (EN/HD ONLY)	2020-11-17



PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	BT approval + 3 weeks	ENQ (30.99)	BT approval + 6 weeks	FV (45.99) (EN/HD ONLY)	12 weeks



# Reminding how to review the plan



# Review of planning: **one change option**

## Review in practice

- ▶ Allowed when current milestone is:
  - At any time before the dispatch for Enquiry, i.e. 30.99 (novelty!)
  
- ▶ It requires TC decision
  
- ▶ As a result:
  - In CEN: secretary to adjust the working area
  - In CENELEC: secretary to contact Data Team [dataservice@cencenelec.eu](mailto:dataservice@cencenelec.eu)

# Review of planning: one change option



Projex-Online Working Area

Select TC

- Create a new decision
- Work on saved and not submitted decisions
- Access previously submitted decisions
- Modification of Work Item information

Modification type  ⓘ

Select the Work Item to update  
 ⓘ

Stage Code	Stage	Target date
10.99	Decision on WI Proposal	<input type="text" value="2018-04-16"/> + 4 months
20.60	Circulation of 1st WD	<input type="text" value="2018-08-16"/> + 4 months
30.99	Dispatch ENQ draft to CMC	<input type="text" value="2018-12-16"/> + 11 weeks
40.20	Submission to Enquiry	<input type="text" value="2019-03-03"/> + 12 weeks
40.60	Closure of Enquiry	<input type="text" value="2019-05-26"/> + 17 months
45.99	Dispatch FV draft to CMC	<input type="text" value="2020-10-26"/> ⓘ + 108 days
50.20	Submission to Formal Vote	<input type="text" value="2021-02-11"/>

Same interface within CEN and CENELEC

However:

- CEN: Implementation by **TC secretary**
- CENELEC: implementation by **Data Team**

# Review of planning: **tolerance request**

## Review in practice

- ▶ One tolerance of 39 weeks (9 months)
  
- ▶ It is requested via:
  - TC decision in CEN, implemented directly by TC secretary in Projex-Online working area
  
  - TC secretary request to Data Team in CENELEC  
[dataservice@cencenelec.eu](mailto:dataservice@cencenelec.eu)

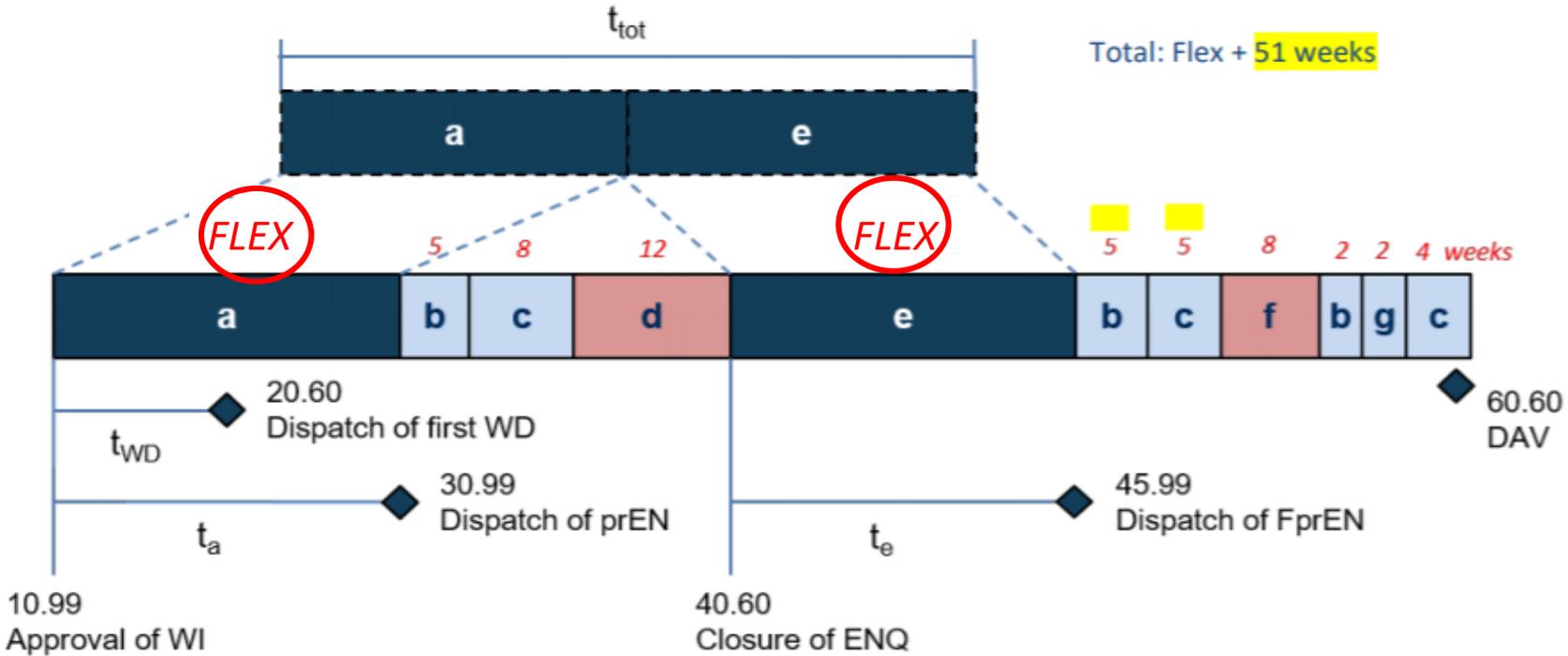
## 3. Presenting the new changes to the process

# Changes for Translation and Editing

- ▶ BT recently decided to:
  - Include a 5-week translation period prior to Formal Vote for all drafts submitted to CCMC (previously: for draft ENs not candidate for citation, translation before FV was optional)
  - Extend to 5 weeks the editing time before FV (previously: 2 weeks)
- ▶ It therefore impacts the number of weeks for internal processes (editing and translation) = 51 weeks
- ▶ Total time for the development of a EN:  
**Flex (periods as decided by the TCs) + 51 weeks**

# Changes for Translation and Editing

Fig. 1



- a Drafting of prEN
  - b Editing
  - c Translation and preparation of national publication
  - d Enquiry
  - e Comments handling / preparation of FprEN
  - f Formal Vote
  - g TC proofing
- Internal process
  - Technical work
  - Voting

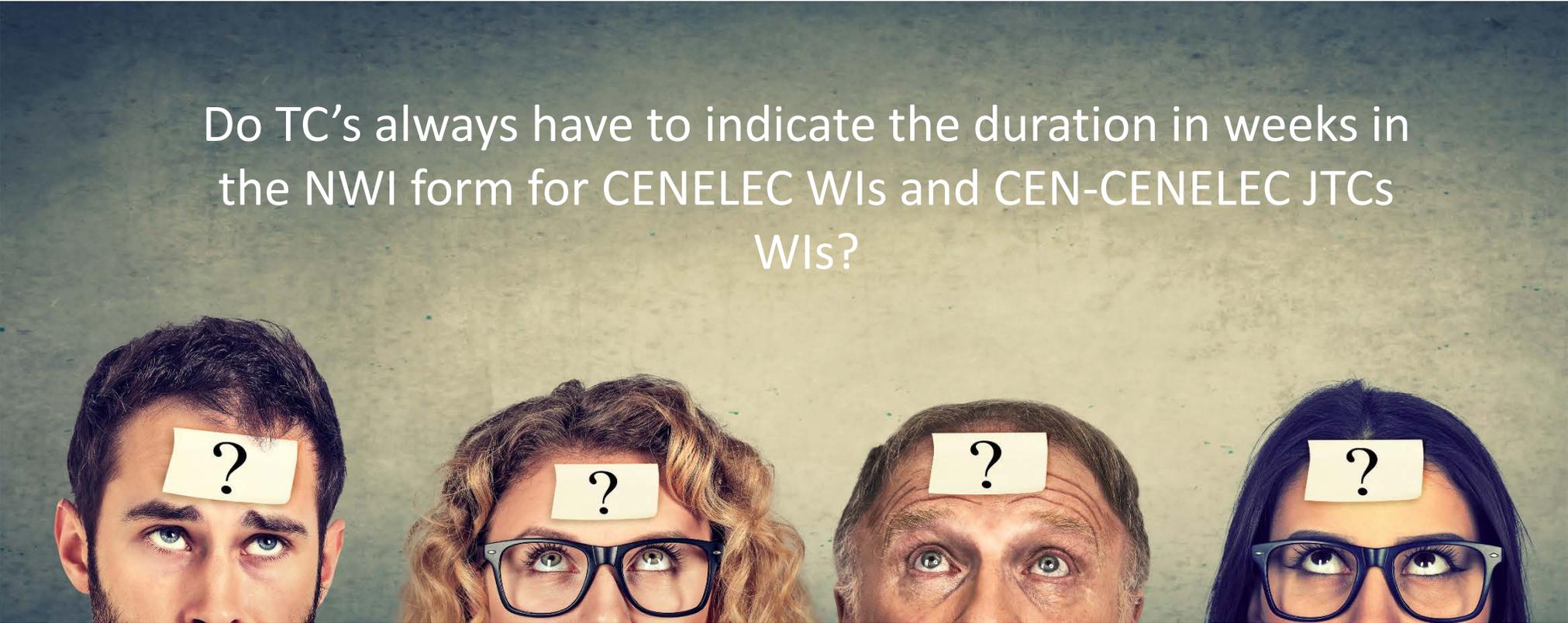
## ► Preparing the New Work Item

The CEN-CLC/JTC approves the planning when **taking a decision** on the NWI

- by using the **NWI form of the lead organization** of that WI
- **At the meeting or via either CIV or CIB**, depending on the organization holding the secretariat, i.e respectively, a CENELEC or CEN Member
- The Secretary allocates the project's timeframe by indicating **the duration in weeks for the 3 delivery dates**, in addition to the three targets dates, in the New Work Item form (first Working Draft, dispatch of ENQ draft, dispatch of FV draft)
- The NWI form is submitted for **BTs approval** by correspondence (4 weeks)
- **Once approved by CEN-CLC BTs**, the dates are encoded by CCMC DATA in the database

# Question time

Do TC's always have to indicate the duration in weeks in the NWI form for CENELEC WIs and CEN-CENELEC JTCs WIs?

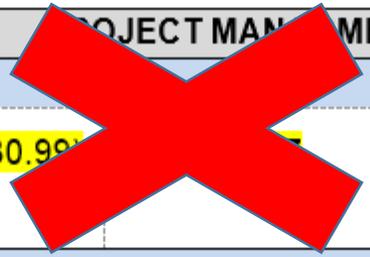


# ATTENTION! – CEN-CLC JTCs

PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	2020-01-27 BT approval + 3 weeks	ENQ (30.99)	2020-02-17 BT approval + 6 weeks	FV (45.99) (EN/HD ONLY)	2020-11-17 12 weeks
Drafting Body					



PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	2020-01-27	ENQ (30.99)		FV (45.99) (EN/HD ONLY)	2020-11-17



PROJECT MANAGEMENT					
Proposed target dates					
1 <sup>st</sup> WD (20.60)	BT approval + 3 weeks	ENQ (30.99)	BT approval + 6 weeks	FV (45.99) (EN/HD ONLY)	12 weeks



- ▶ Now, **at any time before the dispatch for Enquiry, i.e. 30.99**, the TC leadership in cooperation with relevant convenor can choose the following options for changing the planning:
  - ▶ One change option → it requires a TC decision
  - ▶ Tolerance request → TC decision in CEN, secretary request in CLC

Nonetheless, it is recommended to take the decision a few weeks after the dispatch of the 1<sup>st</sup> WD, since the comments received on the first draft may give an indication on the acceptability of the draft for ENQ

# Supporting IT tools

- ▶ IT tools need to support TBOs in the planning and monitoring of the process
- ▶ Improvements have been brought to:
  - **Projex-Online**: to better reflect the planning and any change
  - **Projex-Online working area**: to help CEN TBOs plan target dates more easily and to implement the one change option
- ▶ CCMC will implement changes in Projex-Online so that the 'Adjusted plan' will ALWAYS reflect the latest status of the project, including next stages.
- ▶ Also alerts will be linked to the 'Adjusted plan'.

**NEW FEATURE AS OF 10 DECEMBER 2020!**



Question and Answer

**You** 04:36 PM

When is the next session?

Type your question here...

Send anonymously

Send



European Standardization Organizations

# Thank you for your participation!

*Next webinars:*

19 November: [Webinar for Standard Drafters: "Drafting for XML - Recap of the webinar series"](#)

1 December: [Webinar: European standards addressing material efficiency aspects](#)

10 December: [Annual training session for newly appointed CEN & CENELEC Technical Body Officers](#)