

***Charting the Course***  
**2<sup>nd</sup> National Standards System Conference,**  
Standards Council of Canada,  
Calgary, 15-19 November, 2004

**Track 1: Fuelling the System**  
**Sub-Topic 1.1 Changing Face of Canada**

**“Lessons Learned &  
Challenges Ahead**

**Presentation by: Dr. Jake V. Knoppers, President  
Canaglobe International Inc.**

{tel:+1-613-234-3244, fax: +1-613-234-3935, e-mail: < [mpereira@istar.ca](mailto:mpereira@istar.ca) >}

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**OUTLINE OF PRESENTATION**

- 1. What and Why Standards?**
- 2. Canada’s “Voluntary System” in Context of the USA and European Union**
- 3. What is “Market Driven” Standards Development**
- 4. Case Study: CAC JTC1/SC36 “eLearning”**
- 5. Challenges Ahead: Towards a Sustainable Environment for Prioritizing and Resourcing Standards Development**

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**1. What and Why Standards (1/2)**

A “standard” is defined as:

*“documented agreements containing technical specifications or other precise criteria to be used consistently as rules, guidelines or definitions of characteristics, to ensure that materials, products, processes and services are fit for their purpose”.*

**Key concepts:**

- Ø an agreement (among “autonomous parties)
- Ø technical specifications or other precise criteria
- Ø to be used consistently
- Ø definitions (key to common understanding –unambiguous & multilingual)
- Ø fit for purpose (standards not cast in stone – 5 year cyclical review)

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

1. **What and Why Standards (1/2)**

**Standards development is “consensus building” within a country and internationally.**

**“Consensus” is defined as**

*“general agreement, characterized by the absence of sustained opposition to substantial issues by any important part of the concerned interests and by a process that involves seeking to take into account the views of all parties concerned and to reconcile any conflicting arguments.*

*Note: Consensus need not imply unanimity”*

**Lesson: Volunteers are by nature “consensus builders”**

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

## **2. Canada’s “Voluntary System” in Context of the USA and European Union: the “good”, “bad” & “charting the course” (1/3)**

- Ø USA (via ANSI) approach is basically “participant pay”**
- Ø EU approach (including member states) is a mix of EU supported experts, National Body supported experts, EU (Brussels) commissioned studies, etc.**
- Ø Canada has “National Standards System (NSS)” (via Act of Parliament) of “volunteer” participation of SCC “qualified experts**

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**2. Canada’s “Voluntary System” in Context of the USA and European Union: the “good”, “bad” & “charting the course” (2/3)**

Ø **the “good”**

- Canada recognized as having, sending and ensuring quality experts in international standards development (technical competence)
- Canada as a “non-world power” is seen as a USA vs Europe neutral party, an “honest broker”.
- SCC Forum and related facilities maximize & support coast-to-coast participation and consensus building thereby maximizing and leveraging inputs and work of its volunteer experts
- via SCC Forum and NSS ensures ability of Canada to maximize an integrated, harmonized and consistent approach to and positions

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**2. Canada’s “Voluntary System” in Context of the USA and European Union: the “good”, “bad” & “charting the course” (3/3)**

Ø **the “bad”**

- volunteers put in significant resources (often with only partial support of the organization they work for)
- discouraging for Canadian volunteer experts to contribute significant resources to standards development & then not being able to bring Canadian positions forward at int’l meetings
- at the int’l level face-to-face contact, interaction & consensus building is very important
- volunteers often underestimate the amount of work required to be an “active participant”.
  - risk of volunteer “burn-out”

Ø **“charting the course”**

- need to develop a more sustainable environment including additional forms of resource support.

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

### 3. What is “Market Driven” Standards Development?

#### Three Basic Types:

Ø **Supplier “push” driven:**

Suppliers in participating will be first to market in offering “standard” compliant products & services

Ø **User “pull” driven:**

Users by agreeing on their common requirements and stating them as standards will ensure quality, reduce costs, etc.

Ø **Public Sector Requirements Driven**

In areas of public health, safety, transport, environment, etc.

CSA, ULC, etc. product certification and testing - public sector requirements

Now also “public policy” – consumer protection, accessibility, privacy

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**4. Case Study: CAC JTC1/SC36 “eLearning” (1/4)**

**ISO/IEC JTC1/ SC36 –Information Technology – Learning, Education and Training (ITLET) or “e-Learning.**

- Ø JTC1/SC36 established in 2000 [ [www.jtc1sc36.org](http://www.jtc1sc36.org) ]
- Ø Initially Canada an “O” (observing) member due to lack of participants. Interest but no experience in standards development nationally or international
- Ø Successful second recruitment drive by SCC and Dr. Jake Knoppers who agreed to act as “sherpa” and Chair for 1<sup>st</sup> 3years.
- Ø Canadian Advisory Committee (CAC) formed and now has 25+ members across Canada (private, public and academic sectors)
- Ø CAC JTC1/SC36 works primarily via electronic means via the SCC Forum with at least four face-to-face (+ teleconference) meetings per year

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**4. Case Study: CAC JTC1/SC36 “eLearning” (2/4)**

- Ø Twice yearly international Plenary Meetings of ISO/IEC JTC1/SC36 with Canadian delegation of 4-5 experts.
- Ø Most of the volunteers from private, public and academic sectors have domain experience and expertise (some recognized world-wide) but little in area of standards processes
- Ø Key role of Chair here is to act as “sherpa” and pass on the standards procedures and development skills to subject area specialists
- Ø CAC JTC1/SC36 has two Vice-Chairs to ensure a smooth transition
- Ø There are also 3 int’l standards Project Editors (being trained)

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**4. Case Study: CAC JTC1/SC36 “eLearning” (3/4)**

Ø Hosting “Plenary Meetings”

1. Member countries take turns hosting int’l Plenary Meetings
2. An “honour” & recognition but also much work & fundraising
3. Also a means to use other skills of volunteers
4. Useful to raise profile in Canada, recruit new members

Ø March, 2004, Canada hosted JTC1/SC36 Plenary

1. Local Host – UQAM, Montreal
2. Held 2 day “Open Forum” –very successful
3. Focus “eLearning & standards in context of WSIS\*"
4. Reached Outside “standards world” including World Bank, UNESCO & other key stakeholders with eLearning needs
5. Quebec Minister of Education gave keynote address

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**4. Case Study: CAC JTC1/SC36 “eLearning” (4/4)**

- Ø For each international standards project , there is a CAC JTC1/SC36 member designate as the lead person or “prime”.
- Ø Responsibilities of a “prime” (in coordination with the Chair) include
  - tracking the projects development and ensuring that Canada does not “miss” any deadlines for contributions, ballot votes, etc.
  - maximizing Canadian inputs and contributions to the development of the standard
  - ensure that the resulting standard supports Canadian requirements
  - consult with other JTC1/SC36 experts and interested parties ( including those who are not yet members of CAC JTC1/SC36 – possible recruits, new members)

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**5. Challenges Ahead: Towards a Sustainable Environment for  
Prioritizing and Resourcing Standards Development (1/5)**

- Ø At day-to-day working level need to ensure sustainability in terms of
1. ongoing participation and recruitment of new members
  2. having a “balanced” CAC in terms of suppliers, users, public sector, general interest as well as Canada-wide participation
  3. ensure that all (as many) members as possible become and remain active
  4. make sure that the Chair, or one or two members, do not do or end up doing all the work
  5. need to ensure a team approach with role of Chair including that of motivator, coach, consensus builder

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**5. Challenges Ahead: Towards a Sustainable Environment for  
Prioritizing and Resourcing Standards Development (2/5)**

Ø **Need for Adequate Resource Support**

1. SCC through its SCC Forum supports working electronically including support for teleconference facilities for CAC members not able to “physically” attend CAC meetings
2. SCC currently only covers 25% or less of the out-of-pocket expenses

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**5. Challenges Ahead: Towards a Sustainable Environment for  
Prioritizing and Resourcing Standards Development (3/5)**

Ø **Need for Adequate Resource Support (con’t)**

**Goal No. 1 of the Canadian Standard’s Strategy (CSS) is to  
“influence the formation, evolution and operation of  
standardization bodies that are important to Canada”**

How do we ensure ongoing and sustainable funding for our  
“volunteers” to be there at int’l meetings??

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**5. Challenges Ahead: Towards a Sustainable Environment for  
Prioritizing and Resourcing Standards Development (3/4)**

- Ø How does one identify and prioritize need for a new standard?
- Ø How does one develop an overall strategy for a specific area of standards development?
- Ø How does one determine, develop, etc. (pan-) Canadian requirements, direction, objectives, etc. for a new standard? i.e. prior to the development of the standard itself?
- Ø How does one ensure that all existing and potential stakeholders are consulted? i.e. not just those involved in the development of standards themselves?

2<sup>nd</sup> National Standards Conference: “*Charting the Course*”,  
Standards Council of Canada, Calgary, 15-19 November, 2004  
**“Lessons Learned and Challenges Ahead**

**5. Challenges Ahead: Towards a Sustainable Environment for  
Prioritizing and Resourcing Standards Development (4/4)**

- Ø Need to ensure and provide the required resource support for the volunteer members of the relevant standardization committee(s) nationally and internationally via
1. an existing organization (or group of organizations) provide the on-going sustainable environment
  2. where one does not exist, create an “Advisory Council” with participation of SCC (as a “common space” where key stakeholders for whom a specific area of standardization is important can work together, collaborate and maximize synergies).