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INTERNATIONAL ELECTROTECHNICAL COMMISSION

CONFORMITY ASSESSMENT BOARD (CAB)

Meeting **39**, Geneva, 2016-06-13

SUBJECT

Agenda item 6.5

CAB WG 14 on Promotion – Report for CAB meeting 39 to be held in Geneva, June 2016

TERMS OF REFERENCE (Document CAB/1358/DC).

- i. Identify and profile target audiences (eg: regulators in developing countries, regulators in developed countries; regional economic associations; industry in developing and developed countries; academia; etc.).
- ii. Propose a common and consistent message focused for each target audience profile matched with each IEC CA service.
- iii. Identify the forums, organisations, consortiums and their websites, events, etc., that are most used by the target audiences profiled.
- iv. Identify and collect existing CAB promotional material within the IEC.
- v. Identify and collect existing material used by other international organizations (eg: ISO, ILAC, IAF, ICES, ICSCA, ICC, ICAO, IFIA, etc.) to promote their CA activities.
- vi. Work with the IEC Communications Department to adapt existing material or propose new material that communicates the common message focused for each target audience profiled.
- vii. Work with the IEC Communications Department to define and create a “toolbox” of promotional material conveying a common message that IEC CA people can use when talking to the targeted audiences, at conferences and international events, etc.
- viii. Work with the IEC Communications Department to propose a marketing plan for communicating to the target audiences profiled (eg: present regularly at annual meetings; get links onto targeted forums; etc.).

BACKGROUND

Decision 36/6 of the CAB in Tokyo (Nov 2014) re-established WG 14 – Promotion and appointed Ian Forte as convener. Four meetings have been held - Berlin (March 16th 2015), Geneva (June 16th 2015), Minsk (October 13th 2015) and Singapore (February 5th 2016).

The objective is to increase awareness and reach out about what the IEC has to offer in terms of conformity assessment, particularly for developing countries which could benefit greatly from using the IEC CA services to ensure that the products they import are safe and reliable.

Since the last CAB report, WG 14 has engaged with IEC Communications Dept and reviewed the CA Promotional Plan taking into account the previously identified promotional factors and target audiences. This report includes an executive summary of activities to date and plans moving forward as follows:

Part A – Final Recommendations for formal approval of CAB

Part B – Other items of interest

Part C – Review of Previous CAB Decisions Related to WG 14

Appendices A and B – Supporting Materials

EXECUTIVE SUMMARY

Priority items actioned by WG 14 have been to:

1. Identify and profile target audiences.
2. Identify the forums, organisations, consortiums events, etc., that are most used by the target audiences profiled.
3. Identify, collect and evaluate existing material used by IEC and other international organizations.
4. Develop potential actions that give a common and consistent message focused for each target audience matched with each IEC CA service.

At the previous CAB meeting approval was given to finalize recommendations based on 3 broad recommendations, namely :

1. **Message** – Support adoption of CA improvement strategies
2. **Delivery** – Enhance further development of CA delivery methods by IEC Communications Department
3. **Actions** – Support and encourage WG 14 to implement identified actions

WG 14 has now prepared a Conformity Assessment Promotional Plan (CAPP) which can be used in conjunction with the Promotional factors and target audience Matrix (PM) to enhance CA activities in line with the agreed Terms of Reference. These documents are included in this report as APPENDIX A and APPENDIX B.

Part A: recommendations for approval

CAB members are invited to discuss/approve the following 3 recommendations at the 39th meeting in June 2016.

A.1 Support and Adopt the Conformity Assessment Promotional Plan and the 10 action items therein as follows:

1. Use the Promotional Matrix (PM) as a guide to all promotional activities
2. IEC Communications Department to report CA promotional activities to CAB on an annual basis
3. Develop a CA Vision and Mission statement to complement the IEC Vision
4. Prepare and maintain a Library of CA promotional items
5. Ensure CA promotion is prominent in the new IEC Website
6. Ensure the IEC Style Guide prominently reflects CA requirements
7. Focus E-tech articles about CA in general at TC/SCs
8. Engage CA with Young Professionals
9. Develop a CA brochure using e-learning modules' material
10. Continuously seek CA promotional opportunities

A.2 Establish ongoing activities to ensure adequate monitoring and delivery of promotional activities identified in the CAPP

A.3 Disband WG 14

Part B: other items of interest

B.1 WG 14 noted the need to coordinate existing effort at CA Systems level and to link the CAPP with what the CA Systems are doing already.

- IECEE CB-scheme drivers
 - Industry participation
 - Developing country regulators
 - Regional economic cooperation
 - Current promotion: *“The international passport to world markets” and “One standard, one test performed anywhere, one CA result accepted everywhere”.*
- IECEX market drivers
 - Market access
 - Safety
 - Infrastructure protection
 - National economy protection
 - Current promotion: *“The global compliance tool for industry and global centre of excellence in the field of Ex”.*
- IECQ market drivers
 - B2B vendor qualification
 - Supply chain (counterfeit protection)
 - Supply chain (HSPM) – electronics – ROHS & REACH – (EU, China, etc.)
 - Current promotion: *“Internationally recognized B2B supply chain management tool for the electronic/electrical sector”.*
- IECRE market drivers
 - Financial aspects (high long term investment)
 - Risk management (best practices)
 - Critical infrastructure security – regulatory
 - Promotion to be developed

B.2 The following measures of success (KPIs) were suggested as possible candidates.

- Increasing certificates issued
- Increasing number of countries recognizing CB-certificates
- Number of promotional brochures created/updated
- Improved CA awareness within the IEC SD (measured with surveys)
- Number of CA articles published in Etech
- Increased CA System activity as reported by the CA Systems

Part C: Review of Previous CAB Decisions Related to WG

C.1 Decision 37/18 — WG 14 Promotion

The CAB thanked WG 14 for its report, CAB/1377/R, appreciated the direction it was taking and encouraged it to move forward quickly with the objective to submit a report for the CAB meeting in Minsk.

Review of decision 37/18 - Support for the direction taken by WG 14 is appreciated and a report was submitted for the CAB meeting in Minsk.

C.2 Decision 38/13 — WG 14 Promotion

The CAB thanked WG 14 for its report, CAB/1435/R, and the verbal report from its Convener concerning its meeting held two days before this CAB meeting, appreciated the direction this group was taking and encouraged it to move forward quickly with the objective to submitting a final report for the June 2016 CAB meeting.

Review of decision 38/13 - Ongoing support for the direction taken by WG 14 is appreciated and the final report for the June 2016 CAB meeting has been prepared.

APPENDIX A: CONFORMITY ASSESSMENT PROMOTIONAL PLAN (CAPP)

WG 14 has prepared this plan in response to a formal request (Decision 36/6) from the CAB at the meeting held in Tokyo during November 2014.

Based on nearly 40 years of experience, IEC has developed the expertise, systems and tools necessary to effectively run true Standardised Conformity Assessment services on a global basis. The objective of this plan is to provide promotional guidance to support these efforts and to ensure that IEC is the **leading internationally recognized reference for global CA systems and schemes**. This aligns with the 2011 Masterplan goals and IEC's mission to be globally recognized as the leading provider of standards, conformity assessment systems and related services needed to facilitate international trade and enhance user value in the fields of electricity, electronics and associated technologies.

The promotion activities by IEC of CA must be focused on potential customers in areas that maximise the benefits to them. It is therefore essential to identify the audiences of these customers and ensure the promotion and marketing activities are directed efficiently to them. WG 14 has identified nine target audiences which should be considered for promotional activities as follows:

1. Industry and Manufacturers (CA service seekers)
2. Regulators from Developing Countries
3. National Regulators and Government Departments
4. Regional Economic Cooperation Programs
5. Insurance and Financial bodies
6. Certification Bodies and Test Laboratories (CA service providers)
7. IEC Young Professionals
8. Internal IEC members including Technical committees
9. Consumers and general public

The target audiences form the basis of the promotional matrix (PM) appended to this plan.

PROMOTIONAL MATRIX AND GUIDELINES

Each audience needs incentives to support IEC conformity assessment programs and those incentives (drivers) vary significantly between the audiences based on their needs and goals. For example, the drivers for Industry and manufacturers include profit and marketing goals, while those of Regulators include citizen safety and sustainability needs. The drivers identified by WG 14 are detailed in the promotional matrix. The drivers can be promoted with a clear and consistent message which enunciates the benefits to each audience. WG 14 identified some basic messages that CA promotion should always use.

These are:

1. **VALUE:** Standards only when combined with Conformity Assessment create most value
2. **CONFIDENCE:** IEC CA provides earned confidence giving certainty of performance
3. **QUALITY:** CA equates to proven quality

These basic messages can be summed up in the slogan:

standards = quality
conformity assessment = proven quality

While always emphasising the overall benefits of these programs, it is desirable to tailor the message to appeal to specific audiences. Further, WG 14 has recognised that in many cases each of the CA Systems have particular requirements to further focus their message to each audience. These factors are detailed in the promotional matrix.

The matrix also identifies the “Channel” or organisations through which the appropriate message can be relayed, and with it the mediums that can be employed to deliver that message. For example, Young Professionals can benefit from mediums such as social media or apps, delivered through e-learning programs. In contrast, CA bodies and TLs are likely to respond to live presentations and face to face meetings supported by written material such as brochures.

The CAPP is intended to further promote IEC for their established CA activities, provide a Toolbox of actions and serve as a vehicle for Conformity assessment Services beyond its current suite.

ACTION ITEMS OF THE CONFORMITY ASSESSMENT PROMOTIONAL PLAN (CAPP)

1. **Use the Promotional Matrix (PM) as a guide to all promotional activities** - The promotion activities by IEC of CA must be focused on potential customers in areas that maximise the benefits to them. It is essential to ensure the promotion and marketing activities are directed efficiently as defined in the PM.
 - Objective – A consistent focused message to each individual targeted audience group
 - Benefit – A guide for a consistent message no matter what the medium or channel, in a cost effective manner
 - Responsibility – Communications Department as directed by CAB

2. **Report CA promotional activities** – a report is to be provided each year for the October CAB meeting by IEC Communications Department based on articles, brochures for the CA side of business and key actions for the CA Systems. This is a basic information report with no costs or budget information.
 - Objective – To track the year-to-year promotional activities
 - Benefit – Visibility of promotional activities and their effect including a wide audience at the GM CAB meeting
 - Responsibility – IEC Communications Department

3. **Develop a CA Vision and Mission statement to complement the IEC Vision and Mission** – suggested wording for the Vision is “*To be the leading internationally recognized provider for global CA Systems and Schemes*” and suggested wording for the Mission is “*The IEC's CA mission is to use and enhance the IEC's international standing and reputation, through the efficient development and management of practical global CA Systems and Schemes that are market driven and create, and are recognized as creating, market stakeholder value.*”
 - Objective – To focus on a consistent message and goal
 - Benefit – A consistent and bold message that is visible to internal and external stakeholders
 - Responsibility – CAB (with approval by Council Board)

4. **Prepare and maintain a Library of CA promotional items** – this will be a centralized repository or database to host documents, power points, photos etc with access from outside. IEC must remain in control of the data so access will be subject to various security checks. This may be implemented not only as a CA tool but rather for wider use. A library of presentations from outside (eg: presentations prepared by members of CAB for other occasions) should be included with good tags and key words already used in IEC CA publications. A dictionary of tags will be developed for this and other electronic search purposes. Longer term solutions will include such features as search capability.
 - Objective – Share ideas and workload; have access to approved/owned/authorized images
 - Benefit – Access to data by members will ensure a consistent message with duplication avoided and encourage members to use these data to promote CA

- Responsibility – IT dept to set up, tags to be developed by IEC Communications Department, IEC CO and CA community to provide data
5. **Ensure CA promotion is prominent in the IEC Website** - A new website is being developed to be available in 2017/18. The needs of CA promotion will be considered in line with the promotional matrix. CA will be included in enhanced search facilities using the tag dictionary. Testing of the site will include CA personnel.
- Objective – Easier, more intuitive access to CA promotional material on the IEC website by the target audience groups
 - Benefit – CA activities, articles, references and other material will be prominently displayed consistently in accordance with the Promotional matrix
 - Responsibility – IT, IEC Communications Department, CAB
6. **Ensure IEC Style Guide prominently reflects CA requirements** - Review terminology and provide comments to IEC Communications Department.
- Objective – To ensure consistent terminology and style of CA across the entire IEC
 - Benefit – Consistent communication look and feel
 - Responsibility – IEC Communications Department, CAB
7. **Focus E-tech articles about CA in general at TC/SCs** – In line with the promotional matrix, concentrate on audiences that use IEC standards. Further research the use of IEC standards including where and who buys them and what they are used for.
- Objective – Heighten the awareness by TC/SC Officers and experts about the raison d`être for most of the standards they develop
 - Benefit – consistent message → standards + CA = value
 - Responsibility – IEC Communications Department
8. **Engage CA with Young Professionals** – Increase the interest of YP candidates in CA and identify those who have been exposed to CA. Discuss possible YouTube options with YP's and the YP coordinator. Proposed lead up e-learning questionnaire that can be focused more on conformity assessment and add CA subjects for future GMs, noting that up to 80 YP's will probably attend Frankfurt – traditionally about 20% are interested in CA, but this must be increased by education in both SD and CA. (Both are needed).
- Objective – Improve awareness and interest in IEC CA by YPs
 - Benefit – promotion will multiply with engagement of YPs in CA activities
 - Responsibility – CAB, YP Program Secretariat

9. **Develop a CA brochure using e-learning modules' material** – Leverage the significant information contained in the e-learning modules.
- Objective – Leverage existing material and promote the e-learning modules to targeted audiences
 - Benefit – Major distribution of e-learning modules in line with CA PM objectives
 - Responsibility – CAB Secretariat, IEC Communications Department
10. **Continuously seek CA promotional opportunities** – by considering and implementing new activities designed to promote CA such as reviewing decisions at the end of each CAB meeting for promotional content, conducting surveys that ensure the voice of the customer is being heard and developing a white paper on the value of participation.
- Objective – maximize the promotion of IEC CA activities
 - Benefit – continuity will develop a promotion culture
 - Responsibility – CAB, IEC Communications Department

APPENDIX B: PM – Promotional Matrix showing promotion factors for target audiences across IEC CA and CA Schemes

Audience	Attribute	High level IEC gen.	IECEE	IECEX	IECQ	IECRE
Industry and manufacturers	Drivers	<ul style="list-style-type: none"> • Business development • Profits / Market share • Qualification recognition • Brand competition • Marketing / strategic tool 	<ul style="list-style-type: none"> • Product & Development Cost. • Market access. • Vendor-qualification. • Risk management. 	<ul style="list-style-type: none"> • Market access. • Safety and risk management. • Qualification recognition. 	<ul style="list-style-type: none"> • Vendor qualification. • Marketing / strategic tool. 	<ul style="list-style-type: none"> • Vendor qualification. • Profits / Market share. • Insurance
	IEC Message	<ul style="list-style-type: none"> • Global market access • International recognition • Maximize investment • Confidence 	<ul style="list-style-type: none"> • Lower Costs • Improved Market access • Certainty in vendor-qualification • Reduced Risk 	<ul style="list-style-type: none"> • Increased market access • Certification advantages • Exposure to risk reduced 	<ul style="list-style-type: none"> • Increased market access 	<ul style="list-style-type: none"> • Increased market access • Maximize investment • Confidence
	Channel	<ul style="list-style-type: none"> • NCs, industry forums, industry associations, • f2f + clip, website, apps 	<ul style="list-style-type: none"> • website • IRHMA (international level) • NC at national level 	<ul style="list-style-type: none"> • Website • Apps • Annual Conferences 	<ul style="list-style-type: none"> • Website • Training Workshops 	<ul style="list-style-type: none"> • Website • Annual Conferences
	Medium	<ul style="list-style-type: none"> • Etech articles, Presentations, YouTube, Brochures 	<ul style="list-style-type: none"> • Etech articles, Brochures 	← same	← same	<ul style="list-style-type: none"> • Presentations, • Brochures
Developing Countries regulators	Drivers	<ul style="list-style-type: none"> • Citizen safety • Free quality infrastructure • Use of limited resource • Dumping protection • Address TBT issues 	<ul style="list-style-type: none"> • Verification / infrastructure cost • Dumping protection. 	<ul style="list-style-type: none"> • Safety. • Infrastructure protection. • National economy protection. 	<ul style="list-style-type: none"> • Citizen safety • Dumping protection • Address TBT issues 	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	IEC Message	<ul style="list-style-type: none"> • Free quality infrastructure • Don't reinvent the wheel • Address TBT issues 	<ul style="list-style-type: none"> • Free quality infrastructure • Dumping protection by CB scheme 	<ul style="list-style-type: none"> • UNECE/IECEX regulatory framework + case studies 	<ul style="list-style-type: none"> • Don't reinvent the wheel • Address TBT issues 	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	Channel	<ul style="list-style-type: none"> • Affiliate program, f2f + clip • WTO, UNECE, UNIDO, training programs, etc. 	<ul style="list-style-type: none"> • WTO, UNECE, UNIDO, etc. 	← same	← same	<ul style="list-style-type: none"> • Leverage IRENA government & regulator contacts in DCs.
	Medium	<ul style="list-style-type: none"> • Presentations, brochure, training material, video clip, case studies 	<ul style="list-style-type: none"> • ACAS e-learning 	← same	← same	← same

Audience	Attribute	High level IEC gen.	IECEE	IECEX	IECQ	IECRE
National Regulators & Government Departments	Drivers	<ul style="list-style-type: none"> • Citizen safety • Free quality infrastructure • Address TBT issues 	<ul style="list-style-type: none"> • Low cost verification. • Dumping protection. • Market access. 	<ul style="list-style-type: none"> • Infrastructure protect • National economy protection. 	<ul style="list-style-type: none"> • Citizen safety • Dumping protection 	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	IEC Message	National focus on... <ul style="list-style-type: none"> • Free quality infrastructure • Don't reinvent the wheel • Enhances national indust. export opportunities • Address TBT issues 	<ul style="list-style-type: none"> • Low cost verification • Dumping protection • Free Trade 	← same	← same	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	Channel	<ul style="list-style-type: none"> • NCs, • National regulators, • Gov. departments (trade, energy, environment, etc), • f2f 	← same	← same	← same	<ul style="list-style-type: none"> • Leverage IRENA government & regulator contacts • Gov. departments (energy, environ.), • f2f
	Medium	<ul style="list-style-type: none"> • Presentations, brochure, • training material, video clip, case studies 	← same	← same	← same	← same
Regional economic cooperations	Drivers	<ul style="list-style-type: none"> • Citizen safety • Free quality infrastructure • Dumping protection • Address TBT issues 	<ul style="list-style-type: none"> • Low cost verification. • Dumping protection. • Market access. 	<ul style="list-style-type: none"> • Infrastructure protection. • Regional economy protection. 	<ul style="list-style-type: none"> • Citizen safety • Dumping protection • Market access. 	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	IEC Message	Regional focus on... <ul style="list-style-type: none"> • Free quality infrastructure • Don't reinvent the wheel • Free trade exchange • Enhances regional indust. export opportunities • Address TBT issues 	<ul style="list-style-type: none"> • Low cost verification • Dumping protection • Free Trade 	← same	← same	<ul style="list-style-type: none"> • Critical energy infrastructure. • Financial risk management.
	Channel	<ul style="list-style-type: none"> • Regional NCs, regional organizations, f2f, 	<ul style="list-style-type: none"> • APEC, ASEAN, EU GCC, CU, AFSEC, EASC, MERCOSUR 	← same	← same	<ul style="list-style-type: none"> • Leverage IRENA gov. & regulator contacts in DCs.
	Medium	<ul style="list-style-type: none"> • Presentations, brochure, • training material, video clip, case studies 	← same	← same	← same	← same

Audience	Attribute	High level IEC gen.	IECEE	IECEX	IECQ	IECRE
Insurance & financial	Drivers	n/a	n/a	n/a	n/a	<ul style="list-style-type: none"> • Risk management • Return on investment
	IEC Message	n/a	n/a	n/a	n/a	<ul style="list-style-type: none"> • International best practice, • Instant online certificate verification,
	Channel	n/a	n/a	n/a	n/a	<ul style="list-style-type: none"> • Sector associations, • F2f, website, classification societies (IACS)
	Medium	n/a	n/a	n/a	n/a	<ul style="list-style-type: none"> • Clips, presentations, • testimonials, case studies
CA bodies / TLs	Drivers	<ul style="list-style-type: none"> • Business development • Risk exposure reduction 	← same	← same	← same	← same
	IEC Message	<ul style="list-style-type: none"> • Peer recognition, • International networking, • Access to int. market, Level playing field 	← same	← same	← same	← same
	Channel	<ul style="list-style-type: none"> • Website, f2f, NCs 	← same	← same	← same	← same
	Medium	<ul style="list-style-type: none"> • Presentations, brochure, • training material, video clip, case studies, testimonials 	← same	← same	← same	← same
YPs	Drivers	<ul style="list-style-type: none"> • Career & business dev. • Knowledge, recognition, • International networking, • Leadership opportunities 	n/a	n/a	n/a	n/a
	IEC Message	<ul style="list-style-type: none"> • Standards + CA = value = IEC, • How IEC CA Systems add/create value 	n/a	n/a	n/a	n/a
	Channel	<ul style="list-style-type: none"> • NCs, Presentation at GM, • website, apps, social media 	n/a	n/a	n/a	n/a
	Medium	<ul style="list-style-type: none"> • Brochure, e-learning, clips, success stories 	n/a	n/a	n/a	n/a

Audience	Attribute	High level IEC gen.	IECEE	IECEX	IECQ	IECRE
Internal IEC e.g. TC/SCs	Drivers	<ul style="list-style-type: none"> • Reply to market needs, 	← same	← same	← same	← same
	IEC Message	<ul style="list-style-type: none"> • Standards + CA = value = IEC, • True standardization, • Global package (SD+CA) 	← same	← same	← same	← same
	Channel	<ul style="list-style-type: none"> • TC/SC liaisons, Advisory Committees, NCs, Etech, articles, f2f 	← same	← same	← same	← same
	Medium	<ul style="list-style-type: none"> • Presentations, LinkedIn groups, 	← same	← same	← same	← same
Consumer/ General Public	Drivers	<ul style="list-style-type: none"> • Citizen safety • Sustainability performance etc • Choice with trusted brands and suppliers 	<ul style="list-style-type: none"> • Citizen safety • Sustainability performance etc • Choice with trusted brands and suppliers 	<ul style="list-style-type: none"> • Safety • Critical Infrastructure 	<ul style="list-style-type: none"> • Peace of mind – confidence in component reliability claims eg – aviation and LED lighting 	<ul style="list-style-type: none"> • Clean Energy • Global warming issues • Sustainability • RE innovation
	IEC Message	<ul style="list-style-type: none"> • Earned trust / proven quality • Choice 	<ul style="list-style-type: none"> • Earned trust / proven quality • Choice 	<ul style="list-style-type: none"> • Intern'l best practice • Citizen Safety • Awareness of everyday areas (gas stations, use of gas, LPG, storage of powdered goods) 	<ul style="list-style-type: none"> • Aviation safety assurance • Belief of claims (trust for LED lighting Industry) 	<ul style="list-style-type: none"> • Clean Energy • Global warming issues • Sustainability • RE innovation
	Channel	<ul style="list-style-type: none"> • Social media / Website • Brochure, • Video Clip • Advertisements 	← same	← same	← same	← same
	Medium	<ul style="list-style-type: none"> • Brochure, e-learning, clips success stories, case studies 	<ul style="list-style-type: none"> • Brochure, e-learning, clips, success stories 	← same	← same	<ul style="list-style-type: none"> • Clips, presentations, • Testimonials, case studies