



Standards Under Pressure

SUMMARY: Standard setting will be marked by more conflict. Internationally, more countries are using standards to advance competitiveness or dominance via standards. Within countries, social issues are playing out in standards, making them more political in a polarized era. Associations will be participants in these conflicts—and also potential mediators.

Forecasts

- More standards will become arenas for controversy as sociopolitical issues are pursued through standards. Labor and environmental standards are current examples. This will spread in technology, for instance in ethical standards for algorithms. Polarization will help drive this and make some of the conflicts more intractable.
- Standards will be the scene of more international rivalry. More countries will insist that they have a role in standard setting. Some standard-setting will be used as weapons in trade conflicts, and as barriers to trade.
- As smart and connected technologies become more pervasive, consumers will encounter standards-related incompatibility issues more often. This could create public frustration with letting markets generate divergent standards whose chief purpose is to serve companies' proprietary "walled gardens."
- Global and multilateral standards may face skepticism from populist and protectionist movements and governments. The role of EU standards in the UK's Brexit debates and the Trump administration's doubts about the Universal Postal Union's rate-setting are examples.

Key Uncertainties

Degree of fragmentation of the global standards system

Potential changes in how standards are used to promote political and ethical goals

Regulatory shifts' effects on standards

Changing balance of standards emanating from private entities, standard-setting organizations, and governments



Supporting Trends

- **Trade in services.** Global trade in services is growing, faster than trade in goods.
- **Occupational licensing on the rise.** Over the past several decades, the number of American workers and professions that require licensing has grown substantially, and this licensing is often embodied in standards.
- **America alone.** The United States is withdrawing from more international institutions and trade and arms control agreements.
- **Headwinds for globalized trade.** Obstacles to the expansion of global trade are proliferating.
- **Chinese economic power.** China's economic power is rising as its economy grows and it produces more globally competitive companies.
- **Champion companies from emerging markets.** More globally competitive companies are arising from emerging markets and being viewed as national economic champions.
- **Politicized commerce.** Political polarization is spilling over into commerce, with companies increasingly taking sides on divisive political issues.
- **Diffusion of global power.** Power is becoming more dispersed in the global system.

Related Drivers of Change

- Next-Generation Professionals
- Aging World
- Automating Work

Notable Data Points

PROLIFERATING STANDARDS

Technology standards issued by a representative sample of standards setting organizations **rose from less than 5,000 in 1985 to over 25,000 in 2013.**

Source: Baron, J. and D.F. Spulber, "Technology Standards and Standard Setting Organizations: Introduction to the Searle Center Database," Northwestern Law & Econ Research Paper No. 17-16, revised Feb. 6, 2018

LIMITED LIFESPANS

A 2018 study of thousands of standards documents found that **the half-life of a standards document is 67 months,** or about five and a half years.

Source: Baron, J. and D.F. Spulber, "Technology Standards and Standard Setting Organizations: Introduction to the Searle Center Database"

GENDERED STANDARDS

A woman in a car crash is 17% more likely to die than a man, 47% more likely to suffer serious injury, and 71% more likely to be moderately injured—attributable to testing standards that use dummies based on typical male physiques.

Source: Caroline Criado-Perez, "The deadly truth about a world built for men—from stab vests to car crashes," The Guardian, February 23, 2019.



Strategic Insights

- An aspect of the intersection of sociopolitical issues and standards is that associations will have to pay close attention to standard setting that is based on actual populations, rather than on some subset from one gender, nationality, etc. This is both a business and social issue, and is becoming more prominent in technology, health, and safety.
- Associations involved in global standard setting will benefit from having a strong presence in all major regions, including non-Western countries. At the least, they will need to devote more attention to standards being developed or needed in such countries.
- Associations will be caught up in international standards fights. International standard setting may become more politicized, involving associations in these struggles, and potentially dividing chapters from different countries.
- Associations will need to monitor their approach to standards, including standards creation and updating, to make sure that they are keeping up with a VUCA (volatile, uncertain, chaotic, ambiguous) environment. This includes standards' anticipatory role in preventing future problems.
- More associations will have to deal with the perception that some professional standards and certifications are put in place to reduce competition in a field, and are thus serving as impediments to social mobility and the reduction of inequality. More industry standards will be scrutinized from this perspective.

Timing

- **Stage:** Mature, but shifting in the face of new forces.
- **Speed:** Medium, as standards are continually being developed and modified but also live on for years.

Potential Alternative Futures

- **Standards Cold War:** Standards in many fields break down into major competing global camps.
- **Peace through standards:** Standards provide a global middle ground in which politico-economic competition can be channeled in a managed way.
- **Centralization:** In a more globalized and competitive standards system, fewer standards are left to evolve on their own based on market forces.



Take Action

- **Set the standards where making the rules matters.** Standards are intermediate and long-term responses to critical industry challenges. Fight the battles that are important to your mission and members and merit extraordinary effort.
- **Stand up for expertise and evidence.** The best defense against conflict and differences of opinion is expert consensus based on evidence. If the problem is new or complex, start by establishing guidelines that can evolve into standards and regulations over time as you build greater expertise.
- **Help members navigate regional differences.** As members operate across national, regional, or local jurisdictional lines, they may face variable standards, regulations, and licensing requirements. While the current climate makes harmonization difficult, association leaders can help define what is standard and customary and encourage greater reciprocity and freedom of movement within a country and around the world. Use chapters and affiliates as the local experts on the ground to shape and interpret standards.
- **Call a fair game for all participants.** Absent advocates for inclusive and equitable processes, a few players can influence what gets into a standard. Most members cannot spend time and resources to defend their interests. Following ISO and ANSI processes can mitigate insider advantages and expose anticompetitive requirements and unreasonable compliance costs.
- **Expect to pay to play.** Very few standard-setting organizations make enough profit to offset their upfront investment. Representing member interests before multiple standard setting bodies, convening expert volunteers in deliberations, and tracking decisions across months and years require considerable resources.

Keyword Search

To continue researching this change driver, use these search terms:

standards, standard-setting, standard-setting organization, standards and services, gender and standards, China and standards

Who Will Be Affected

Associations engaged in standard setting to any degree will find it more challenging to counter conflicts with strong consensus. Chapters and affiliate organizations will need to become strong advocates within their own jurisdictions. Smaller businesses and individual professionals are most likely to rely on their associations to represent their interests and interpret compliance requirements. Global organizations will have to demonstrate greater sensitivity about economic and social differences that constrain applying universal expectations to local conditions.

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- guidance in performing environmental scans; and
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