

BRITISH STANDARD

A standard for standards –

Part 2: Structure and drafting – Requirements and guidance

ICS 01.120

Publishing and copyright information

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Summary of pages

This document comprises a front cover, an inside front cover, pages i and ii, pages 1 to 22, an inside back cover and a back cover.

Foreword

Publishing information

This part of BS 0 is published by the British Standards Institution (BSI) and comes in effect on 1 January 2006.

Supersession

This part of BS 0 supersedes BS 0-3:1997, which will be withdrawn on 31 December 2005.

Relationship with other publications

BS 0 is intended primarily for the use of BSI committee members and staff, and those providing first drafts of standards and related British Standards publications. It was last published in 1997 in three parts and subsequently amended in 2002. The standard is issued in two parts:

- *Part 1: Development of standards – Specification;*
- *Part 2: Structure and drafting – Requirements and guidance.*

Information about this document

This edition has been fully revised and follows the principle adopted for Part 1 in that it is confined to matters of fundamental policy and principle. Details of style and presentation appear in *The BSI guide to standardization – Section 2: Rules for the structure, drafting and presentation of British Standards*. It is envisaged that the latter document might regularly be updated to reflect changing requirements both in BSI's market and in its own production systems.

Details of significant changes introduced in this edition of BS 0-2 are discussed in the introduction.

Presentational conventions

The provisions (see **3.2.1**) of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is "shall".

Commentary, explanation and general informative material are presented in smaller italic type, and do not constitute normative elements (see 3.2.2).

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

Introduction

This edition of BS 0-2 has been developed so as to provide a concise exposition of the principles governing the drafting of standards of national (i.e. UK) origin. Many details concerning editorial practice and policy are now to be found in *The BSI guide to standardization – Section 2: Rules for the structure, drafting and presentation of British Standards*. That document also contains instructions for the implementation in the UK of European and international standards.

This edition of BS 0-2 takes the form of a specification and guide. The principles it encapsulates are presented as requirements that are binding on all types of formal standard of national origin. However, these requirements have been drafted so as to allow a reasonable degree of latitude in order to accommodate the developing needs of the standardization community. It is also recognized that this community (both users and producers of standards) are in most cases used to working with standards of international and European origin and it has been the intention to maintain the high degree of consistency in drafting practice that has already been achieved amongst the organizations concerned.

This edition introduces a major innovation concerning the presentation of informative guidance and commentary. It has been developed from the principle adopted for some years in a category of standard known informally as “practice specifications”, and allows the provisions of the standard (see **3.2.1**) to be supplemented by informative material that is presented distinctly, but in parallel with them. This allows the standard to maintain the rigour and authority of a specification whilst offering the user a large amount of explanatory guidance that would previously have been difficult to accommodate.

BS 0 is to be used as an exemplar for all other standards of national origin, which therefore allows the commentary and guidance feature to be adopted for them if it is thought to be of value. There is, of course, no compulsion to use this approach, and it is likely that many traditional product specifications will continue to be drafted much as previously. However, it does allow technical committees to introduce text in a prominent position that can be used to:

- offer guidance on the application or implementation of the provisions of a standard; or
- explain the context or background of a particular provision; or
- explain the committee’s reasoning in respect of provisions that might otherwise be thought to be obscure or contentious.

Examples of this feature have been selectively introduced into the text of this document, particularly in Clause **4**, where it has been thought helpful to offer an explanation and rationale for some basic principles that might otherwise be thought to be arbitrary.

Amongst other provisions to which the user’s attention is drawn, is new text to be introduced in the foreword to codes of practice (see **5.2**), in order to strengthen the ability of this type of standard to support conformity assessment principles.

1 Scope

COMMENTARY ON CLAUSE 1

Detail concerning the adoption of European and international documents as British Standards documents can be found in BS 0-1:2005, 5.7, and in The BSI guide to standardization – Section 2.

This part of BS 0 specifies requirements, and gives guidance, in respect of the structure and drafting of those documents of national (i.e. UK) origin that are published as British Standards or Drafts for Development.

It does not explicitly include requirements for BSI publications that are not regarded as being part of its formal standardization programme.

This part of BS 0 is concerned principally with matters of policy and principle. Further detailed prescriptions concerning the presentation of British Standards are to be found in *The BSI guide to standardization – Section 2*.

2 Normative references

COMMENTARY ON CLAUSE 2

Normative references are deemed to be indispensable insofar as reference to the cited document would have to be made in order fully to comply with the provision in which the reference appears. It should be possible to take the accuracy and appropriateness of such citations on trust.

See 7.8.2 for the criteria for normative references to be dated or otherwise.

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 0-1:2005, *A standard for standards – Part 1: Development of standards – Specification*

BS 7998-3 (IEC 60027-3), *Letter symbols to be used in electrical technology – Logarithmic and related quantities, and their units*

BS ISO 31 (all parts), *Quantities and units*

BS ISO 999, *Information and documentation – Guidelines for the content, organization and presentation of indexes*

ISO 10241, *International terminology standards – Preparation and layout*

The BSI guide to standardization – Section 2, Rules for the structure, drafting and presentation of British Standards (<http://www.bsi-global.com/NSB/Governance>)

Shorter Oxford English Dictionary, 5th edition. Oxford: Oxford University Press, 2002

Chambers Dictionary of Science and Technology. Edinburgh: Chambers Harrap, 1999

3 Terms and definitions

For the purposes of this part of BS 0, the terms and definitions given in BS 0-1:2005, together with the following apply.

3.1 types of standard (and related documents)

COMMENTARY ON 3.1

Requirements for individual types of standard are given in Clause 5.

3.1.1 specification

standard that sets out detailed requirements, to be satisfied by a product, material, process, service or system, and the procedures for checking conformity to these requirements

3.1.2 method

standard that gives a complete account of the way in which an activity is performed (and, where appropriate, of the equipment or tools required to perform it) and conclusions are reached, to a degree of precision appropriate to the stated purpose

3.1.3 vocabulary

standard listing definitions of terms used in a particular sector, field or discipline

3.1.4 code of practice

standard comprising recommendations for accepted good practice as followed by competent and conscientious practitioners, and which brings together the results of practical experience and acquired knowledge for ease of access and use of the information

3.1.5 guide

standard that gives broad and general information about a subject, with background information where appropriate

3.1.6 classification

standard comprising designations and descriptions of different grades of a product and that identifies and arranges data in hierarchical order

3.1.7 draft for development**DD**

provisional document, developed under broadly the same processes as a formal standard and published when standardization of a particular subject is urgently required, but further research or development is required before it can be published as a British Standard

3.2 elements of a standard**3.2.1 provision**

expression that takes the form of a statement, an instruction, a recommendation or a requirement

COMMENTARY ON 3.2.1

“Provision” is the generic term used for those fundamental elements of text that convey criteria necessary in order to be able to claim compliance with a standard. Note that they are not always requirements; in documents such as codes of practice they are recommendations. Further detail is given in Clause 5.

3.2.2 normative element

COMMENTARY ON 3.2.2

“Normative” is a frequently misunderstood term referring to a very simple concept. It is applied to those elements that “set the standard”, and without which there would be no standard, and no possibility of claiming compliance with it. It therefore cannot be applied to text, such as in this commentary, that conveys supplementary information or that is essentially discursive.

element that describes the scope of the document, and which sets out provisions

[ISO/IEC Directives, Part 2, 2004, **3.8**]

3.2.3 informative element

COMMENTARY ON 3.2.3

Material such as that presented in this column is deemed to be “informative”.

element that provides additional useful information

3.2.4 required element

COMMENTARY ON 3.2.4

See 6.1.3 for the list of required elements.

element, the presence of which in a document is obligatory

[ISO/IEC Directives, Part 2, 2004, **3.10**]

3.2.5 clause

basic component in the subdivision of text

3.2.6 annex

COMMENTARY ON 3.2.6

In some older British Standards the term “appendix” has been used.

optional element, integral to a standard but containing material more appropriately presented separately from its main provisions

3.3 caution

instruction that draws attention to the risk of damage to the product, process or surroundings

[BS 4884-1:1992, **2.1**]

3.4 warning

information that draws attention to the risk of injury or death

[BS 4884-3:1992, **3.24**]

3.5 figure

illustration in the form of a diagram, sketch, perspective drawing, graph, chart, nomogram, photograph or one of a variety of engineering drawings, e.g. dimensional, detail, assembly

4 Principles

4.1 General

COMMENTARY ON 4.1

In very simple terms, a standard is an agreed way of doing something. Standards serve a wide variety of needs and purposes, and are applied to commodities, technologies, services and processes in order to promote their safety, compatibility and ease of use.

More specifically standards may be used to:

- streamline business processes and facilitate national and international trade and communication;*
- act as effective tools for the implementation of public policy both in support of legislation and outside a legislative framework;*
- codify good practice in support of broader societal, consumer and environmental interests.*

A standard shall:

- a) be complete within the limits given in its scope clause;
- b) be consistent, accurate and unambiguous;
- c) take full account of the current state of technical development;
- d) provide a framework in which innovation can be accommodated and supported; and
- e) be readily comprehensible to those who might reasonably be expected to use it (i.e. its target audience).

The type of standard used shall be selected as being the most appropriate for its purpose from amongst those defined in **3.1**.

Irrespective of its target audience, the provisions of a standard shall be drafted with due regard to the legitimate needs of the whole community, and, in particular, to those of the end users of its subject matter.

4.2 Legal context

COMMENTARY ON 4.2

With a very few exceptions, standards do not have force of law: the application of a standard is almost always voluntary, although standards are very often used in support of legislation, and compliance with a standard is sometimes quoted in legislation as offering a route to discharging legal obligations.

It is important that those drafting standards are quite clear about the distinction between standardization and legislation (see BS 0-1:2005, Annex A), and that no confusion is reflected in the text of a standard.

It is a fundamental principle that standards never make requirements or recommendations for compliance with particular legislation. To do so would imply that such compliance is optional; standards users are expected to obey the law regardless of whether they comply with standards.

Legislation is constantly changing and evolving, and no standard can be expected to keep pace with these changes. In order to prevent a particular standard being regarded as an authoritative statement of current legislation, it is rare for legislation to be quoted or listed extensively. However, it is good practice to draw readers' attention to particular important pieces of legislation that might have an impact on the way in which a standard is applied (e.g. the Health and Safety at Work etc. Act, 1974).

Standards are very often used as the basis for contracts and it is therefore particularly important that they are drafted sufficiently clearly and robustly as to be able to withstand legal scrutiny.

4.2.1 A standard shall not make any requirement in respect of compliance with the law or discharge of legal obligations.

4.2.2 The following statement shall appear in all British Standards in bold type at the end of the foreword:

“Compliance with a British Standard cannot confer immunity from legal obligations.”

4.2.3 In a British Standard that is accorded statutory recognition as a means of complying with specific legal requirements (see BS 0-1:2005, Annex A), the statement given in **4.2.2** shall be qualified by wording such as:

“... However, compliance with this British Standard is cited in/under ... as a means of compliance with the ... Act/Regulations”.

4.2.4 Reference in a standard to products (including services), materials or systems that are the subject of intellectual property rights (e.g. patents, registered designs or trade marks) shall be made only in accordance with the appropriate provisions in BS 0-1:2005, **7.7**.

4.3 Audience

COMMENTARY ON 4.3

It is particularly important that the target audience for each standard is identified before detailed drafting begins.

If the identity of the audience is unclear or confused, there is a risk that:

- *a standard might make requirements of parties who are in no position to comply with them (e.g. in the case of a specification for a domestic appliance, making a requirement on the end user for it to be regularly serviced); or*
- *a standard will fail to attract its target audience.*

For the sake of clarity and transparency, it is generally desirable that each discrete publication addresses one audience only.

Where it is deemed necessary or desirable for a standard to address more than one audience, the other audiences should ideally be addressed in separate annexes, and should be identified as such in the scope clause. An example would be of a product specification, primarily addressing a manufacturer, also containing a small number of provisions concerning storage or distribution that might fall under the responsibility of another party.

This need also arises in cases where a generic standard has to impose more stringent provisions for use in particular applications, e.g. military, aerospace.

Guidance on the drafting of documents that explicitly address a multiple audience (e.g. a code of practice concerned with an extended production chain) is given in PD 6612.

A standard shall be written in a style intended to be clearly understood by its target audience.

The intended audience of each standard, or discrete part thereof, shall be identified, explicitly or implicitly, in the scope clause.

If it is particularly important that the execution of the provisions of a standard is entrusted to appropriately qualified and competent people (e.g. where the procedures involved should only be performed by people with specialist skills), a statement to this effect shall be included in the foreword.

4.4 Conformity, compliance and verifiability

COMMENTARY ON 4.4

One of the main characteristics of a formal standard is that, when it is fully and properly applied (see 4.3), the user should be able to expect a high degree of consistency and repeatability (i.e. commonality) in the outcomes of its provisions. The exact degree of commonality will vary according to the type of standard (see Clause 5).

The achievement of such commonality by a product or process is termed “conformity” to the standard. Its achievement by a person or body (e.g. a company or organization) is termed “compliance”.

Note that “commonality” does not imply uniformity, and that it should only be sought and expected in respect of factors that are within the scope of the standard. A simple example would be a standard the sole purpose of which is to specify critical dimensions for a particular product. For products for which conformity to the standard is claimed, it should be expected that the specified dimensions would be identical in every case, irrespective of the manufacturer, place or date of manufacture. However, as no requirements are stipulated in respect of colour or materials of construction, there should be no such expectation in respect of these factors. Indeed, the contrary is likely as manufacturers often use factors outside the scope of a standard to achieve differentiation of their products in the marketplace.

The achievement of the appropriate level of commonality demands that the provisions of a standard are objectively verifiable to the extent appropriate to the type of standard.

Standards shall be drafted so as to conform to the requirements of BS 0-1:2005, 5.8.

4.5 Consistency

COMMENTARY ON 4.5

British Standards (including implementations of European and international standards) form a large, mutually dependent and constantly evolving body of codified expertise and experience. It is important that this body of documentation has a high degree of consistency and compatibility. Detailed requirements are therefore made in respect of consistency and homogeneity.

A list of current British Standards and technical committees relating to the factors listed can be found in The BSI guide to standardization – Section 2.

To ensure consistency throughout all British Standards, the text of each shall, where appropriate, be in accordance with the relevant British Standards and BSI policy documents for:

- a) terminology;
- b) principles and methods of terminology;
- c) quantities, units and symbols;
- d) abbreviations;
- e) bibliographic references;
- f) technical drawings;
- g) graphical symbols;
- h) limits and fits;
- i) tolerancing of dimensions;
- j) uncertainty of measurement;
- k) statistical methods;
- l) environmental conditions and associated tests;
- m) health, safety and the environment;
- n) electromagnetic compatibility;
- o) quality and conformity.

4.6 Planning

COMMENTARY ON 4.6

1) Before the drafting of a standard can begin, it is necessary to identify all matters to be included, and to establish the title, scope, structure, division into parts and relationships between them and with other standards.

2) Evidence of compliance with the requirements of this clause will be sought as part of BSI's project acceptance process (see BS 0-1:2005, 5.2).

3) If a series of similar or related standards is to be issued, it is advisable to establish a model document as the method of presentation to be followed to ensure consistency within the series.

A standard shall be drafted in the most appropriate form for its purpose, selected, at the outset of the work, from the types of standard defined in **3.1**.

Matters to be considered shall include:

- a) the area to be standardized;
- b) the intended users of the standard;
- c) the types of standard or series of different standards that are required to fulfil the need (see also **6.1.4** for requirements in respect of division into parts);
- d) the time and cost of implementing the standard, and the value or benefits to the immediate and wider communities of its publication and use;
- e) the relationship between the standard and the wider body of standards material, and with other documents relevant to its use, such as regulations.

5 Requirements specific to different types of standard

5.1 Specification

COMMENTARY ON 5.1

1) Great care has to be taken to avoid drafting requirements that are inherently not verifiable or open ended (e.g. "all risks shall be considered").

For a requirement to be objectively verifiable, it has to be physically possible to determine whether or not it has been met by a particular item or system. Requirements that can only be verified by observing the absence of breakdown or catastrophe do not constitute verifiable requirements.

2) As a general principle, performance requirements are preferred to design requirements as they are less likely to inhibit innovation.

3) Requirements may, where appropriate, be supplemented by informative material presented in a distinctive manner as exemplified by this part of BS 0. Alternatively, where informative material is brief and infrequent, it may be provided in the form of notes to the text. Where it is a single significant piece of information it may be included as an informative annex. Further guidance can be found in The BSI guide to standardization – Section 2.

A specification shall be drafted as a coherent set of absolute requirements, each being objectively verifiable and constructed from the point of view of a third party called upon to verify conformity.

Verification of conformity shall be possible equally by a first party (e.g. supplier), a second party (e.g. purchaser) or an independent third party.

Criteria for claiming compliance shall be stated in such a way as to ensure that, whichever way the claim is made and supported, exactly the same requirements are satisfied.

Test methods prescribed within a specification shall conform to the requirements of **5.3.1**.

5.2 Code of practice

COMMENTARY ON 5.2

A code of practice should be expected to reflect the typical needs of its intended user community and their customers, and give particular regard to matters of public safety. However, it might not necessarily reflect “best practice” in absolute terms, especially in circumstances where such levels of excellence might only rarely be required or affordable. Such cases are generally best dealt with by contract.

The normative provisions of a code of practice are expressed as recommendations, and in some cases it might be neither feasible nor necessary to seek absolute objective verifiability. However, users claiming compliance with a code of practice should be expected to be able to justify any course of action that deviates from its recommendations, and a statement to this effect should be made in the foreword.

A code of practice shall be drafted to reflect current good practice as employed by competent and conscientious practitioners, taking into account the current state of technological development, and giving due regard to the appropriate balance between fitness for purpose and cost of implementation.

It shall be drafted in the form of recommendations and guidance; it shall not contain requirements.

The following statement shall be included in the foreword of every code of practice to distinguish it from a specification.

“As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.”

5.3 Method

5.3.1 Method of test

COMMENTARY ON 5.3.1

Reference should be made to BS ISO 78-2 for guidance on the preferred way of presenting a method of test.

The same principles apply to methods contained within other types of standards.

A method shall be drafted so as to ensure that all the procedures it prescribes are repeatable and reproducible and their outcomes consistent, to the extent appropriate to the stated scope of the standard.

5.3.2 Method of specifying

COMMENTARY ON 5.3.2

The BSI guide to standardization – Section 2 gives further detail concerning the drafting of standards for which some provisions depend on documented agreement between two contracting parties.

A method of specifying shall be drafted to give the characteristics of a product, material, process or system from which selection has to be made and for which values might have to be agreed between purchaser and manufacturer.

A method of specifying shall also establish definitions and methods of verification and give guidance on factors to be considered in determining values for characteristics.

A method of specifying shall, where appropriate, provide the basis for understanding and agreement between contracting parties, by giving direction for the formulation of enquiries and the placing of tenders and orders.

5.4 Guide

COMMENTARY ON 5.4

A generally discursive and non-prescriptive document such as a guide does not lend itself to claims of compliance. However, it is good practice to employ as many as possible of the disciplines appropriate to other types of standard.

A guide shall be drafted in the form of guidance, supported by recommendations where appropriate. It shall not contain requirements.

5.5 Vocabulary

COMMENTARY ON 5.5

Older standards of this type were frequently called “glossaries” or “nomenclatures”; terms that can still be encountered.

A vocabulary, being a compendium of terms and definitions, shall be drafted in accordance with the requirements applying to those elements of a standard (see 7.8.4), and also in accordance with ISO 10241.

5.6 Classification

A classification standard shall designate and describe different grades of a product, or identify and arrange data in hierarchical order.

5.7 Draft for development

COMMENTARY ON 5.7

A draft for development may be developed as such from the outset. Alternatively, a document initially envisaged as being a formal British Standard might sometimes be published as a draft for development if it becomes apparent during its development that it would benefit from an extended period of trial and consultation.

A draft for development, being a potential British Standard, shall in all respects be drafted in the manner appropriate to a formal standard of the same type (e.g. specification, method).

However, in order to alert the user to the status and context of a draft for development, and in particular to the fact that it cannot be regarded as a formal British Standard, the text prescribed in *The BSI guide to standardization – Section 2* shall always appear in the document.

5.8 Auxiliary publication

COMMENTARY ON 5.8

If the need for an auxiliary publication is identified, it should be discussed with appropriate BSI staff as early as possible in the development process.

If an auxiliary publication, such as a reference card, colour chart, map or test sheet, is to be issued as an adjunct to a British Standard, it shall be developed for publication in accordance with the same procedures as other British Standards and shall carry the number of the main standard with a suffix letter (e.g. “BS 5261C”).

6 Structure, divisions and elements

6.1 Structure

6.1.1 Every standard, whether issued on its own or as a part in a series of standards, shall apply to a single discrete subject.

6.1.2 Every standard shall have a unique identification number.

6.1.3 Every standard shall have a logical, coherent structure. As a minimum, it shall include the following elements:

- a) a title;
- b) a foreword;
- c) the scope statement (see 7.7); and
- d) main text with provisions.

6.1.4 If a standard is subdivided into parts, each part shall be designated by an arabic numeral, e.g. “BS 0-2” for Part 2 of BS 0.

6.2 Elements of text

6.2.1 Part

COMMENTARY ON 6.2.1

Other than an auxiliary publication (see 5.8), a “part” is the only subdivision of a standard that is published as a discrete document (see also the commentary on 6.2.2).

A standard shall be divided into parts if:

- a) some provisions only will be of particular interest to separate groups of users, e.g. performance, quality assessment;
- b) some provisions will be restricted to a single user interface, e.g. in a product standard, between purchaser and supplier;
- c) different types of standard are needed, e.g. a specification and a code of practice;

the subject is extensive and the time required to produce all the information in one document would be unacceptable.

6.2.2 Section

COMMENTARY ON 6.2.2

The use of sections within a long, complex standard (or part thereof) can be a very useful navigational tool.

Where it is considered desirable to divide a standard (or part of a standard) into groups of related, sequential clauses, such divisions shall be designated as “sections”.

Sections are no longer produced as separately published documents.

6.2.3 Clause

The text of each standard and each part of a standard shall be subdivided into clauses.

6.2.4 Subclause

COMMENTARY ON 6.2.4

The extent to which it is necessary to number individual elements of text is largely a matter for subjective judgement. Further guidance can be found in The BSI guide to standardization – Section 2.

Subdivisions of a clause shall take the form of primary subclauses (e.g. “2.1”), divided, if necessary, into further numbered subclauses and/or un-numbered paragraphs.

7 Drafting

7.1 General

Text shall be clear, succinct and logical. There shall be no contradictions or inconsistencies within the text. Provisions once specified shall not be varied or undermined by subsequent text.

Normative provisions shall be clearly distinguishable from informative material. Informative text shall never be used to modify or qualify a normative provision.

Provisions shall be expressed in terms consistent with the objectives of the standard as set out in the scope clause, for example a specification for a product shall specify the attributes of the product, not the actions of users.

If it is necessary to state certain inescapable facts or requirements that are relevant to the scope of the standard but apply outside its provisions, they shall be referred to in informative text, with the regulatory, safety or other reasons explained.

7.2 Terminology

Every term used in a standard or series of standards shall be used in only one sense, and only one term shall be used for a single concept, regardless of whether the term is defined in the terms and definitions clause (see 7.8.4).

Where a technical term is defined in a standard, it shall be used only in the sense defined, and shall be presented in a consistent manner throughout the standard.

Where a technical term is not defined, it shall be used in the sense generally accepted by specialists in the subject. If some other more specialized or limited meaning is given to a term, the term and its concept shall be included in the terms and definitions clause.

The term “weight” (see also 9.2) shall not be used to mean a mass or force; it shall be used only to indicate a physical item (e.g. a block of metal).

7.3 Title

The title shall appear on the front cover.

The wording of the title shall be as concise as possible and consistent with the titles of other similar standards. It shall identify the subject of the standard in such a way as to distinguish it from that of other standards, without including unnecessary detail. Any necessary additional details shall be given in the scope clause.

COMMENTARY ON 7.3

Detailed prescriptions for the structuring of titles are to be found in The BSI guide to standardization – Section 2.

7.4 Publishing information

7.4.1 Publication date

The date of publication shall be given.

Unless otherwise indicated in the foreword (see 7.5), the publication date shall also be the effective date. If the effective date is not known at the time of publication because, for example, legislation is pending, the statement "This standard comes into effect on a date to be announced" shall be included.

When the effective date becomes known, it shall be announced by the issue of an amendment.

A standard dealing with the safety of consumer products shall not have a deferred effective date.

7.4.2 Previous editions

The dates and, where appropriate, any different identifiers, of all previous editions shall be given.

7.5 Foreword

The foreword shall not contain provisions of the standard.

The foreword shall contain:

- a) the title of the committee, and where appropriate, the sub-committee, responsible for the drafting of the standard; and
- b) prescribed wording concerning contractual and legal considerations (see 4.2.2 and 4.2.3), followed by any information regarding relevant statutory regulations,
together with as much of the following information as is appropriate:
 - c) the effective date of the standard if this is different from the publication date, and the reasons for this difference;
 - d) standards, including previous editions, that, as a result of the publication currently being drafted, are now superseded, partially superseded and/or withdrawn;
 - e) a description of the standard's relationship to other national, European, international and foreign standards;
 - f) acknowledgement of copyright material;
 - g) reference to relevant international work;
 - h) for a revision, a statement of the standard's relationship with, and principal changes from, the previous edition, particularly if the revision:
 - 1) does not entirely supersede the previous edition;
 - 2) has a different identifier;
 - 3) contains provisions that affect the interchangeability of products conforming to the previous edition;
 - i) any problems in preparation (e.g. matters omitted because agreement could not be reached);
 - j) acknowledgement of copyright material;

- k) note of commendation from a government department or agency (e.g. Health and Safety Executive);
- l) hazard warnings;
- m) a statement to the effect that a standard is designed for use by appropriately qualified and competent people (see 4.3);
- n) in a code of practice, reference to the possibility of confusion with a specification (see 5.2);
- o) a statement of the presentational conventions used in the standard.

7.6 Introduction

COMMENTARY ON 7.6

An introduction can be useful in cases where it is felt necessary to explain the context and broader background to a standard. It is the appropriate place in which to refer to factors such as research, academic, social or legislative developments that might have had a bearing on the development of a standard.

Where included, the introduction shall be positioned after the foreword. If numbered, it shall be numbered as Clause 0.

It shall not contain provisions of the standard.

7.7 Scope

COMMENTARY ON 7.7

The significance of the scope statement cannot be overstated. It serves not only to define and delimit the standard, but also the work of those involved in its development.

Agreeing and drafting the scope clause can be an extended and difficult task, but is one without which a standardization project cannot proceed. It should therefore be one of the very first tasks at the inception of a project, and a robust yet succinct scope statement is an essential part of the approval documentation required for inclusion of a project in BSI's work programme.

It should also be remembered that the scope statement is often used as the basis for bibliographical abstracts and promotional material.

The scope clause, the first normative element of a standard, shall be numbered as Clause 1.

The scope clause shall be drafted in precise detail, once the objectives of the standard have been decided. It shall:

- a) give the objectives of the standard, identifying what is to be standardized and for whose benefit (see 4.3);
- b) define the content of the standard in sufficient detail to ensure that all of the normative elements fall within the stated scope;
- c) state any limitations that are not implicit, particularly if they might otherwise be unexpected;
- d) be able to stand as a definition of the function of the standard, which could be used, if necessary, in the event of a dispute.

7.8 References

7.8.1 General

COMMENTARY ON 7.8.1

The use of material that appears in another document frequently saves unnecessary duplication and ensures that a coherent body of standards material is developed and maintained (see 4.5 and BS 0-1:2005, 4.6). The decision as to whether to reproduce such material, or to make a reference to it, is largely subjective and has to be based on a wide variety of factors such as availability, ownership, scale and the probable needs of the user. Guidance is available from BSI staff.

References shall be employed when it is either necessary or desirable to cite material in another publication (e.g. a test method) that cannot practically be included in the standard being drafted.

References to other documents shall be determined as being normative (i.e. indispensable to the full compliance with a standard) or informative (i.e. providing supplementary information or guidance), and shall be listed accordingly as prescribed in 7.8.2 and 7.8.3.

7.8.2 Normative references

7.8.2.1 General

If normative references are required in a standard, they shall be listed in Clause 2 using the standard prefatory wording exemplified in this part of BS 0.

7.8.2.2 Normative reference to other standards

COMMENTARY ON 7.8.2.2

References should be dated (i.e. include the publication date of the document in question) when reference is made to a specific element (e.g. clause, figure, table) that is liable to change in any subsequent edition.

In order to form part of a coherent set of standards (BS 0-1:2005, 4.6), provisions needed in drafting a new standard shall be made either:

- explicitly; or
- by reference to those appearing in another standard or standards.

Where, in respect of a single provision, reference is made to more than one standard, criteria shall be given for determining which standard is appropriate.

Where the reference is general and it can reasonably be assumed that the latest edition will always be the most appropriate for the purpose, the reference should be undated.

Undated references are preferable as the relationship between the two standards is easier to manage, the referenced document is likely to be more readily available and the user will, by implication, have the benefit of the most recent consideration of the subject.

Further guidance is given in The BSI Guide to standardization – Section 2.

7.8.2.3 Normative reference to documents other than public standards

COMMENTARY ON 7.8.2.3

In principle, referenced documents should be published by formal public standards bodies (e.g. BSI, ISO, IEC) and reference to a European or international standard should be to the BS adoption of it (e.g. BS EN ISO ... rather than ISO ...).

However, there are occasions when it is necessary or desirable to make normative reference to documents (e.g. dictionaries, websites) outside the body of public standards. In such cases, further guidance is given in The BSI Guide to standardization – Section 2.

Normative reference shall not be made to material that is:

- not publicly available;
- not readily accessible;
- known to be of unstable or ephemeral nature.

7.8.3 Informative references

If reference is made to any publication for background information or other informative purpose, bibliographic details of the publication shall be given in a separate element entitled “Bibliography”.

7.8.4 Terms and definitions

COMMENTARY ON 7.8.4

1) Where appropriate, the terms and definitions clause may be expanded to include, in separate subclauses, lists of recurrent abbreviations and symbols.

2) Before drafting new definitions, a check should be made on related standards in the same subject area, and on appropriate vocabulary standards (e.g. BS 6100, IEC 60050) to see whether an appropriate definition already exists. Multiple definitions of a single term are strongly discouraged.

3) It is acceptable to amplify a definition in accompanying informative text.

A technical term shall be used in the sense defined in an appropriate vocabulary standard. If some other more specialized or limited meaning is given to a term, the term and its concept shall be included in the terms and definitions clause.

Only those terms used in the standard and requiring definition shall be defined in the terms and definitions clause. Terms used in their normal dictionary sense shall not be included unless there is obvious risk of ambiguity.

Definitions shall be confined to providing a succinct definition of a term, and shall not contain any further provisions of the standard. They shall be drafted in accordance with the rules given in *The BSI guide to standardization – Section 2*, as exemplified in Clause 3 of this part of BS 0.

7.9 Annexes

COMMENTARY ON 7.9

A single annex may be designated simply as “Annex” and does not need to carry an identifier. Any reference to it in the main text can be in a form such as “A.4.1”.

If an annex contains only a single clause, there is likewise no need for it to bear a clause number.

An annex shall be included only if reference to it is made in the main text of the standard.

Annexes shall follow the main text, arranged in the order in which they are first cited. Multiple annexes shall each be identified by capital letters in alphabetical order, beginning with “A”.

The annex designation shall be followed by “(normative)” or “(informative)” according to whether or not it is indispensable for the application of the document. The title of the annex shall follow on a separate line.

An informative annex shall not contain any provisions of the standard.

7.10 Footnotes

COMMENTARY ON 7.10

Footnotes may be used to supply useful but incidental information such as:

- a) conversion factors;*
- b) the status of a referenced document at the time of publication;*
- c) contact information for suppliers of trade-marked equipment;*
- d) contact information for holders of relevant intellectual property rights.*

Footnotes to the main text shall not contain provisions of a standard.

Whilst footnotes to tables and figures may contain provisions, informative and normative text shall not be combined within a single footnote.

7.11 Index

If an index is required, it shall be prepared in accordance with BS ISO 999.

7.12 Tables and figures

Each table or figure shall be introduced by a statement in the text that makes clear its relevance and status (i.e. normative or informative).

The normative or informative status of a table or figure shall be indicated by the way it is referenced in the text.

Tables and figures shall be set out in a form that is simple and direct. The use of large, complex tables or figures shall be avoided, e.g. by presenting the information in two or more simple items.

It is permissible to incorporate graphics within tables, or tabular material within figures.

8 Verbal forms used in standards

8.1 Auxiliary verbs

COMMENTARY ON CLAUSE 8.1

1) Further guidance on this, and other aspects of linguistic style to be used in British Standards, can be found in The BSI guide to standardization – Section 2.

Auxiliary verbs shall be used consistently throughout a standard, in the form appropriate to the nature of the standard (see Clauses 3 and 5), as given in Table 1.

Table 1 Verbal forms

Verb	Implication	Typical context
shall	requirement	normative element of a specification
should	recommendation	— normative element of a code of practice — informative element of any standard
may	permission (within the stated limits of a standard, to adopt a particular course of action)	informative element of any standard
can	possibility and capability	informative element of any standard
is	description	— normative element of a method — informative element of any standard

2) A distinction is drawn between “may”, used to indicate permissibility, and “might”, used to indicate possibility or probability.

In order to avoid confusion between the requirements of the standard and external statutory obligations, the auxiliary “must” shall not be used to express a provision of a standard.

8.2 Imperative mood

The imperative mood shall be used in procedural instructions, e.g. in a method: “Put out the light”.

8.3 Present tense for description

The present tense shall be used if there is need for description, e.g. of apparatus in a method: “Four struts support the platform”.

9 Spelling and presentation

9.1 Spelling

COMMENTARY ON 9.1

Attention is drawn to the possibility of confusion in the spelling of verbs ending in “-ize”, “-ise” or “-yse”, e.g. “standardize” or “analyse”. The form listed first in the relevant entry in The Shorter Oxford English Dictionary should be used.

Other than in the case of “sulfur”, spelling shall be in the form given in *The Shorter Oxford English Dictionary*. Technical terms that do not appear in that dictionary shall be in the form given in the *Chambers Dictionary of Science and Technology*.

In the case of “sulfur” (and its derivatives), the International Union of Pure and Applied Chemistry (IUPAC) spelling shall be used.

The spelling and abbreviations of names of, for example, organizations or publishers shall be those by which they refer to themselves.

If the dictionary gives more than one form of spelling, the form that is given first shall be used.

9.2 Quantities, units and symbols

COMMENTARY ON 9.2

Whilst SI units are strongly preferred, it is recognized that, for some applications it is normal practice to employ other units or systems of units. Such usage, if soundly justified, may be reflected in a British Standard by agreement with BSI staff (see also The BSI guide to standardization – Section 2).

Unless otherwise agreed, the International System of units (SI) shall be used for units of measurement, including those additional units that are recognized internationally for use with SI. Symbols for units shall conform to the appropriate part of BS ISO 31.

Any use of a non-SI unit shall be only by concession, and shall be accompanied in the standard by a footnote giving the conversion factor to the appropriate SI equivalent.

Symbols for logarithmic quantities used in electronics (e.g. decibels and nepers) and their usage shall be in accordance with BS 7998-3.

To avoid ambiguity in the use of the term “weight” (see also **7.2**), the text shall make clear whether force, expressed in newtons, or mass, expressed in kilograms is intended.

The term “billion” shall not be used.

9.3 Presentation

All matters of content and presentation not otherwise prescribed in this part of BS 0-2 shall be in accordance with *The BSI guide to standardization – Section 2*.

Bibliography

BS ISO 78-2, *Chemistry – Layout for standards – Methods of chemical analysis*

BS 4884-1:1992, *Technical manuals – Specification for presentation of essential information*

BS 6100 (all parts), *Glossary of building and civil engineering terms*

PD 6612, *Guidance on the preparation of codes of practice for building*

IEC 60050 (all parts), *International Electrotechnical Vocabulary*

ISO/IEC Directives, Part 2, *Rules for structure and drafting of International Standards*

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