

BS 0:2011



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A standard for standards – Principles of standardization

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Foreword

Publishing information

This British Standard was published by BSI to come into effect 1 January 2012. It was prepared on behalf of the BSI Standards Policy and Strategy Committee.

Supersession

This British Standard supersedes BS 0-1:2005 and BS 0-2:2005, which are to be withdrawn on 31 December 2011.

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

BS 0, *A standard for standards*, is the main document by which BSI sets out how British Standards and related documents are developed and maintained.

This edition of BS 0 is in a single part, covering broadly the same scope as BS 0-1:2005. The drafting rules previously specified in BS 0-2:2005 have been replaced by a version of the ISO/IEC Directives, Part 2: *Rules for the drafting and presentation of International Standards* [N1], which incorporates much of the BSI-specific drafting guidance previously presented in other documents.

Reverting to earlier practice, the provisions of this British Standard are not expressed as absolute requirements, but as principles. These establish the basis on which common expectations can confidently be held, whilst allowing some flexibility in interpretation and application. The exercise of this flexibility has to be based on a soundly reasoned consideration of what is appropriate, reasonable, necessary and practicable in any particular context. This approach is intended to provide an effective framework for British Standards to support the increasingly diverse markets and circumstances in which they are developed and applied.

The principal changes introduced in this edition of BS 0 are as follows.

- The intention that it is not aimed at any specific readership, but that it effectively addresses all those who might have an interest in British Standards.
- Reflecting this wider potential readership, more extensive discussion of the context of standardization and the European and international standards development processes.
- The introduction of looser forms of expression than might be familiar to those used to standards that employ a strictly codified pattern of verbal usage. Reflecting the notion that standards are essentially codified agreements used to support common expectations, repeated use is made of constructions such as “is expected ...”. This is to be taken to convey the intention that all those party to a particular provision (e.g. BSI, committee members, standards users, as appropriate) will align themselves with it within the reasonable bounds of flexibility. An “expectation” is therefore analogous to a “requirement”, but with an inherent degree of flexibility. There is no suggestion that more prescriptive verbal forms may be abandoned in those standards for which they are necessary.
- A commitment to greater transparency in respect of the standards development and committee processes.
- A clear protocol for the preparation of minutes of meetings.
- Greater detail on criteria for committee membership, including clarification of the distinction between “individual” and “co-opted” members.
- Greater detail on the principles for appointing UK delegations and experts to work in international and European standardization.
- More detailed discussion of roles, responsibilities and desirable qualities.
- The introduction of an expectation on each committee member to provide basic details of relevant experience, expertise and commercial interests, to be shared with peers on the respective technical committee.
- A more extensive and detailed discussion of intellectual property rights as they apply to British Standards.
- A glossary of frequently encountered terms, abbreviations and acronyms (in addition to the definition of terms used in the standard).

Certain topics regularly arise during any revision of BS 0, and it was decided:

- to retain the 'z' spelling usage (e.g. "standardization") for consistency with the preferred variant listed in the Shorter Oxford English Dictionary, noting also that it is the traditional English usage rather than an Americanism;
- to retain the decimal point in preference to the decimal comma, noting that it reflects the overwhelmingly predominant practice in the UK and is inconsistent with many international and European standards that are adopted without change by BSI;
- to retain the term "chairman" in preference to any alternative, again reflecting predominant usage in European and international standardization bodies; and
- to retain the "f" spelling of "sulfur" and its derivatives, noting that it is the agreed variant adopted by the International Union of Pure and Applied Chemistry (IUPAC) and most analogous professional bodies in the UK, and reflects the general usage of most of those in the UK scientific community.

1 Scope

This British Standard sets out the principles of standardization undertaken by the British Standards Institution (BSI) in its role as the UK National Standards Body (NSB).

The principles encompass the development, publication, maintenance and application of British Standards and related standardization documents, together with the UK's participation in European and international standardization.

The principles set out in this document do not include discussion of BSI's non-NSB activities, nor detailed discussion of the rules and procedures of the international and European standardization bodies.

2 Normative references ¹⁾

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

[N1] ISO/IEC Directives, Part 2:2004, *Rules for the structure and drafting of International Standards* www.iso.org/directives

[N2] CEN/CENELEC Internal Regulations, Part 3, *Rules for the structure and drafting of CEN/CENELEC publications* www.cen.eu/boss

[N3] BSI, *Rules for the structure and drafting of UK standards* www.bsigroup.com

¹⁾ This clause, which contains standard wording used for all European and international standards, is intended to identify all other documents to which reference *might* need to be made in the application of this standard. In practice, it might be possible to apply this and many other standards without recourse to all or any such external references.

3 Terms and definitions

For the purposes of this British Standard, the following terms and definitions apply.

NOTE Additional terms, abbreviations and definitions are given in Annex A.

- 3.1 amendment**
alteration and/or addition to previously agreed technical or editorial provisions of a standard
- 3.2 British Standard**
BS
standard, developed and published by BSI following the principles set out in this standard
- 3.3 BSI**
British Standards Institution
- 3.4 BSI Board**
governing body of BSI
- 3.5 CEN**
European Committee for Standardization
European standards body, of which BSI is the UK member, officially recognized by the European Union and the European Free Trade Association
- 3.6 CENELEC**
CLC
European Committee for Electrotechnical Standardization
European standards body, of which BSI is the UK member, officially recognized by the European Union and the European Free Trade Association for standardization in the area of electrical engineering
- 3.7 CEN/CENELEC enquiry**
stage of the development process at which a draft standard (prEN) is distributed by the CEN/CENELEC Management Centre to CEN or CENELEC national members for public consultation
- 3.8 chairman**
formally appointed leader of a committee
- 3.9 committee**
NOTE The term "committee" is used in this standard to refer to both technical committees (3.9.1) and subcommittees (3.9.2). It does not refer to any other administrative or governance committee of BSI.
- 3.9.1 technical committee**
TC
body responsible for a particular area of standards work
- 3.9.2 subcommittee**
SC
subordinate committee of a technical committee
- 3.10 committee member**
person serving on a BSI committee or panel

- 3.11 common modification**
alteration, addition to or deletion from the content of a reference document, approved by CEN/CENELEC and thus forming part of the EN (and HD for CENELEC)
[CEN/CENELEC Internal Regulations, Part 2:2002, definition 2.14]
- 3.12 compliance**
action of a person or body in fulfilling requirements
NOTE See also 3.15.
- 3.13 conflict of interest**
situation in which, because of other activities or relationships, transparent and effective representation of declared interests, or of a mandated brief, is or could be compromised
- 3.14 conflicting national standard**
British Standard within the same scope and field of application as a European/international standard and with provisions such that compliance with the British Standard precludes compliance with the European/international standard or vice versa
- 3.15 conformity**
fulfilment of a requirement
[BS EN ISO 9000:2005, definition 3.6.1]
NOTE See also 3.12.
- 3.16 consensus**
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.
[ISO/IEC Guide 2:2004, definition 1.7]
- 3.17 consumer**
individual member of the general public purchasing or using property, products or services for private purposes
[BS ISO 26000:2010]
- 3.18 corrigendum**
alteration and/or addition to a standard that corrects one or more errors or ambiguities introduced in either drafting or production
- 3.19 decision-making process**
transactions of a committee or panel directly related to establishing whether consensus has been reached on any particular matter requiring a decision
- 3.20 delegate**
representative of a national standards body to a committee of an international or European standards body
- 3.21 DPC**
draft for public comment
stage in the development of a British standard at which wider consultation is sought

- 3.22 draft**
standard under development
- 3.23 EN**
European standard
standard adopted by CEN/CENELEC and carrying with it an obligation of implementation as an identical national standard and withdrawal of conflicting national standards
[CEN/CENELEC Internal Regulations, Part 2:2002, definition 2.5]
NOTE A European Standard produced by ETSI carries with it the same obligations.
- 3.24 essential intellectual property rights**
essential IPR
intellectual property rights that have been included within a standard such that it would be impossible to implement the standard without making use of those rights, and the only way to avoid an infringement of the rights in respect of implementation of the standard is therefore to request a licence from the owner
- 3.25 ETSI**
European Telecommunications Standards Institute
European standards body officially recognized by the European Union and the European Free Trade Association for standardization in the area of telecommunications
- 3.26 expert**
person nominated from a national committee to contribute to the detailed work of a working group (or similar body) in ISO, IEC, CEN or CENELEC
- 3.27 formal vote**
stage of the development process at which the final text of a prEN (FprEN) is circulated by the CEN/CENELEC Management Centre to national members for approval by weighted voting
- 3.28 IEC**
International Electrotechnical Commission
international standards body for standardization in the area of electrical and electronic technology and engineering, of which BSI is the UK member
- 3.29 IEC Conformity Assessment Board**
IEC/CAB
body responsible for setting the IEC's conformity assessment policy, reporting to the IEC Council Board
- 3.30 informative**
characteristic of material in a standard that supplements normative material by offering advice, information and guidance
- 3.31 international standard**
ISO or IEC standard
- 3.32 IPR**
intellectual property rights
rights having no tangible form, but representing the product of creative work or invention
NOTE Such rights include:
- *copyright and related rights, rights in designs;*

- *patents, rights to inventions, whether registered or unregistered.*

- 3.33 IR**
Internal Regulations (of CEN/CENELEC)
rules of the European standards bodies
- 3.34 ISO**
International Organization for Standardization
international standards body, of which BSI is the UK member
- 3.35 ISO Conformity Assessment Committee**
ISO/CASCO
ISO's policy development committee on conformity assessment, reporting to the ISO Council
- 3.36 normative**
characteristic of material in a standard that is essential to the application of the standard in the manner intended, and against which it is possible to demonstrate and claim conformity to the standard
- 3.37 normative reference**
document to which reference is made in the standard in such a way as to make it indispensable for the application of the standard
- 3.38 panel**
subordinate group of a BSI technical committee or subcommittee, responsible for specific delegated tasks, broadly equivalent to an international or European Working Group
- 3.39 provision**
normative element of a standard
- 3.40 regulation**
document providing binding legislative rules, that is adopted by an authority
[ISO/IEC Guide 2:2004, definition 3.6]
- 3.41 SPSC**
Standards Policy and Strategy Committee
policy committee established by the BSI Board to advise it as appropriate on matters of standardization policy and strategy and to oversee all work undertaken in BSI committees
- 3.42 standard**
document, established by consensus and approved by a recognized body, that provides, for common and repeated use, rules, guidelines or characteristics for activities or their results, aimed at the achievement of the optimum degree of order in a given context
NOTE Standards should be based on the consolidated results of science, technology and experience, and aimed at the promotion of optimum community benefits.
[ISO/IEC Guide 2:2004, definition 3.2]
- 3.43 standardization**
activity of establishing, with regard to actual or potential problems, provisions for common and repeated use, aimed at the achievement of the optimum degree of order in a given context

NOTE 1 In particular, the activity consists of the processes of formulating, issuing and implementing standards.

NOTE 2 Important benefits of standardization are improvement of the suitability of products (including services) and processes for their intended purposes, prevention of barriers to trade and facilitation of technological co-operation.

[ISO/IEC Guide 2:2004, definition 1.1]

3.44 standard of UK origin

British Standard developed within the UK

3.45 standstill

obligation accepted by the members of CEN/CENELEC/ETSI not to take any action, either during the preparation of a European standard or after its approval, which could prejudice the intended harmonization or endanger the progress of work at European level and, in particular, not to publish a new or revised national standard which is not completely in line with the European standard

3.46 TR

Technical Report

document published by ISO, IEC, CEN or CENELEC containing informative material not suitable to be published as a standard or a Technical Specification

NOTE A TR may include, for example, data obtained from a survey carried out among the national members, data on work in other organizations, or data on the state of the art in relation to national standards on a particular subject.

3.47 TS

Technical Specification

document published by ISO, IEC, CEN or CENELEC about which there is the possibility of future approval as a standard, but for which at present there are reasons precluding immediate publication as a standard

NOTE Typically the reasons for this would be that the required support for such approval cannot be obtained; there is doubt on whether consensus has been achieved or the subject matter is still under technical development.

3.48 UK mirror committee

national mirror structure to the European/international technical committees, ensuring the formulation of coherent national positions

3.49 vote

ballot

process of approval undertaken for specific purposes by international and European standards bodies

3.50 WG

working group

group of experts, appointed by an international or European technical committee or subcommittee, responsible for drafting documents

3.51 WI

work item

standards project

3.52 work programme

detailed list of all subjects (work items) to be developed within the scope of a technical committee, forming a group of interrelated standards projects which together achieve a common purpose in support of the strategic aims of a technical committee

4 Principles of standardization

4.1 Context and purpose

4.1.1 Context

Standards exist principally to provide a reliable basis on which common expectations can be shared regarding specific characteristics of a product, service or process.

4.1.2 Purposes

The purposes of British Standards include:

- a) facilitating trade, particularly in reducing technical barriers and artificial obstacles to international trade;
- b) providing a framework for achieving economies, efficiencies and interoperability;
- c) enhancing consumer protection and confidence; and
- d) supporting public policy objectives and, where appropriate, offering effective alternatives to regulation.

4.1.3 British Standards

All British Standards have the defining characteristics of:

- a) development by balanced and broadly representative standing committees that retain responsibility for them indefinitely, and that reach agreement by consensus;
- b) being made subject to unrestricted open consultation; and,
- c) remaining subject to systematic periodic review as to their continuing validity.

4.1.4 Voluntary status

British Standards are voluntary in that there is no obligation to apply them or comply with them, except in those few cases where their application is directly demanded by regulatory instruments. They are tools devised for the convenience of those who wish to use them. In certain circumstances the actions of third parties might have the effect of making the application of a standard a commercial necessity, but BSI has no control over these actions and is not a party to them.

4.1.5 Authority and reliability

For a British Standard to be a useful and attractive tool for conducting business or supporting public policy, it has to command the trust and respect of all those who are likely to be affected by it.

The reliability of a British Standard rests not just on its technical accuracy and the sound judgement of those responsible for its text. There needs also to be a widely held confidence that:

- a) it is desirable, practical and authoritative;

- b) it offers no particular nor exclusive advantage to any party;
- c) it serves the needs of the wider community;
- d) in application it will be consistent with regulations and legal principles established at the time of publication.

The measures that are necessary to underpin this confidence are set out in Clause 5. It is the responsibility of all parties involved in the development of a standard to ensure that these are not compromised.

4.1.6 Adherence to BS 0

Adherence to the principles set out in BS 0 is a condition of participating in the development of British Standards.

4.2 The National Standards Body

4.2.1 Standards development

BSI has a role as the UK National Standards Body (NSB). This is established under its Royal Charter and codified in the *Memorandum of Understanding between the United Kingdom Government and the British Standards Institution* (the MoU). The role includes co-ordinating and facilitating the development of standards of UK origin, as well being the UK focus for participation in European and international standardization. This is through the International Organization for Standardization (ISO) and the International Electrotechnical Commission (IEC), together with regional (i.e. European) standards produced by the European Committee for Standardization (CEN) and the European Committee for Electrotechnical Standardization (CENELEC).

BSI is also responsible for co-ordinating and facilitating the development of other types of standardization document, notably Technical Specifications (TSs) and Technical Reports (TRs). These do not share all the same defining characteristics, and they are therefore not to be regarded as British Standards (see 9.4.2).

NOTE BSI is appointed as the National Standards Organization (NSO) for ETSI activities in the UK. Specific details of BSI involvement in this work can be found in the *Memorandum of Understanding between ETSI and the NSOs* (see http://portal.etsi.org/Inso/revise_nov02.asp).

BSI's NSB role also entails responsibility for publishing and promoting the standards that it develops. It maintains an infrastructure such that:

- a) each of its standards is routinely reviewed; and
- b) concerns about the content of a standard can be investigated and acted upon.

4.2.2 Resourcing

Standardization projects impose considerable demands on the resources of all those involved in them. It is BSI's responsibility to apply its resources taking into account the benefits that are likely to accrue from each project in the context of its overall work programme.

It is also necessary to be conscious of the resources of others involved in the work, particularly in terms of travel and attendance at meetings.

Meetings of committees should be convened only for those purposes that are difficult to achieve by other means.

4.3 Application of standards

4.3.1 Principles of application

Responsibility for selecting and applying a standard lies with its user. In general, BSI is not able to assist in this (nor take any responsibility for it) other than to try to provide an indication of the scope and content of a standard. In some circumstances, BSI might develop formally published guidance documents on the application of a particular standard or set of standards.

Standards are drafted in the expectation that those who use them will be appropriately experienced, qualified and equipped to do so, that they will apply them conscientiously and, where necessary, take sound advice by others qualified to provide it.

4.3.2 Interpretation

Responsibility for interpreting a standard rests with its user, informed where necessary by appropriate expert advice. Ultimately, the only body with the power to give a definitive interpretation is a court of law.

To avoid undermining the basis for common expectations set out in 4.1.1, BSI does not offer individual interpretations of standards.

However, any ambiguities, inconsistencies or possible errors notified to BSI will be referred for consideration by the committee responsible for the standard, as will any proposals for changes or improvements. These notifications are actively encouraged as a contribution to the maintenance of a document (see also 6.2.1).

4.3.3 Declarations of compliance and conformity

4.3.3.1 Principles

Declarations that an individual or organization has complied with the provisions of a standard, or that a product or service conforms to a standard (otherwise termed "conformity attestation"), are entirely the responsibility of those making such declarations (see also 4.3.4).

Not all standards can support such claims in a meaningful way (see 9.4). However, those that are have to be drafted such that a valid claim can be made. Further information on conformity assessment is given in ISO/IEC Directives, Part 2:2004 [N1], 6.7.

BSI committees should refer conformity assessment issues to the Conformity Assessment Policy Committee in the first instance, which can refer an issue to ISO/CASCO or IEC/CAB if necessary.

4.3.3.2 Third-party conformity assessment

As a long-standing principle of public policy, it is generally not acceptable for a standard to state that a legitimate claim of compliance is dependent on third-party conformity assessment. There are certain established derogations from this principle, and if, exceptionally, it is believed that a circumstance has arisen where a standard will need to include a requirement for third-party conformity assessment, the approval of SPSC is required.

Standards may be developed to support an identified market need for third-party conformity assessment. In these cases:

- a) the existence of, or the feasibility of, third-party conformity assessment should be established before the project is approved;
- b) the standard may not be explicitly linked to any individual conformity assessment scheme; and

- c) advice from at least one conformity assessment provider should be sought during the drafting process.

Beyond its NSB role, BSI provides commercial conformity assessment services. It is therefore imperative that all procedures and transactions surrounding the development of standards that might be used to support third-party assessment schemes are demonstrably independent of any commercial interest that BSI might have.

4.3.4 Market surveillance

BSI is not empowered, nor resourced, nor qualified to conduct market surveillance or to examine allegations of false claims of compliance with a standard. Such cases should usually be referred in the first instance to the trading standards unit of the local authority in which the allegation arose.

4.4 Transparency

As part of BSI's commitment to the transparency and accountability of the standardization process, the principal documents associated with the work programme of the committee are available on request. The identities of the organizations represented on a committee are in the public domain. To protect against lobbying or media attention, the identities of individual members are confidential.

Notes of decisions made at committee meetings held since the implementation of this edition of BS 0 are available on request. Minutes of earlier meetings are not publicly available.

This restriction also applies to documents that are potentially sensitive, such as briefing papers, or of potential commercial value, or that are subject to restrictions by their originating organizations.

5 Development of British Standards

5.1 Principles

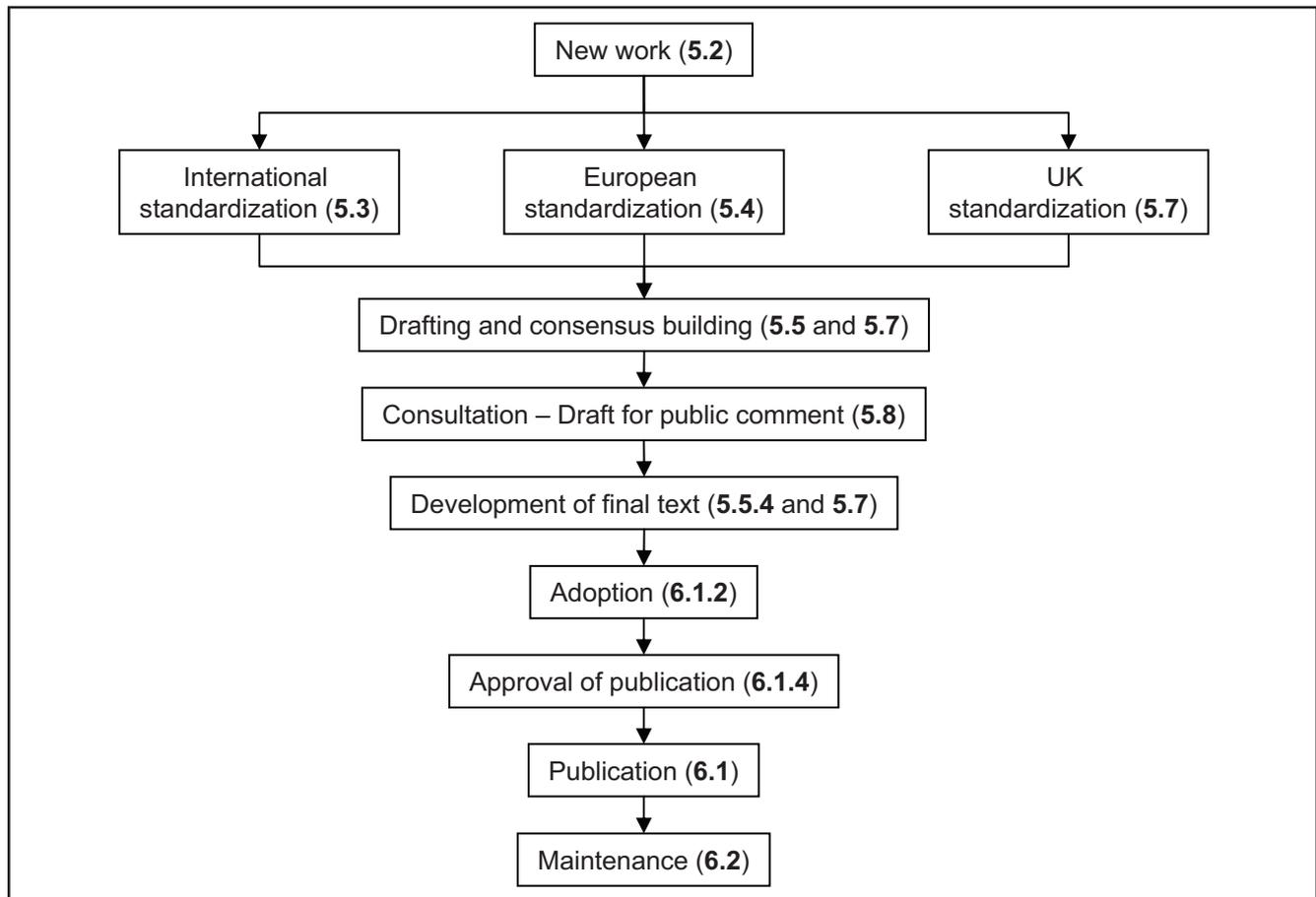
The principles underpinning the development of British Standards are set out in 4.1 and 4.2 and are discussed in further detail in Clause 7.

The majority of documents published as British Standards have their origin in international standards (developed by ISO and IEC) or European standards (developed by CEN and CENELEC, often in partnership with their international counterparts). The remainder are developed exclusively by BSI to meet particular needs in the UK.

From a UK perspective, the focus for all three development streams is the BSI technical committee responsible for the relevant area of work (see 7.1). The principles of development for each type of document are broadly similar, but there are some important procedural differences which are covered in 5.3 and 5.4.

The steps involved in the development, publication and maintenance of British Standards are shown in Figure 1.

Figure 1 Stages of standards development, publication and maintenance



5.2 New work

Anyone, whether an individual, or a corporate or collective or public body, can propose a new British, European or international standard, or the revision of an existing one.

A proposer is expected to be able to demonstrate:

- a) a broadly based need for the proposed standard;
- b) that the work is likely to have active support from a wide range of relevant interests;
- c) that there are enough resources to provide an initial draft and complete the project within a reasonable timescale; and
- d) that no conflict would exist with any British Standard or European standard, either published or in development (see 5.4).

NOTE The "reasonable timescale" for completion of a project will vary according to its complexity and the breadth of consensus that needs to be established. Less than a year is rarely achievable; more than three years is rarely acceptable.

It is also expected that detailed consideration will have been given to the type of publication (see 9.4) best suited to achieve the intended purpose and that the proposal will be accompanied by a draft scope statement (see 9.3.3).

All such proposals are evaluated against these criteria, also taking into account strategic priorities and resourcing. Where considered appropriate, wider consultation and impact assessment might be undertaken.

Proposals specifically for projects to be undertaken at international or European level are also subject to approval by the UK mirror committee (see 5.6) and to the approval process of the relevant international or European standardization body.

The international and European processes entail consultation with national bodies to establish whether there is:

- 1) a market demand for the proposed standard; and
- 2) sufficient resource available to allow the project to be undertaken efficiently.

The outcome of the consultation is expressed as a national vote as to the desirability and feasibility of the proposal.

All new work approved is announced publicly with a view to attracting a wide range of involvement in its development.

Most projects are accepted onto the work programme on the basis of the scope statement originally submitted (see also 9.3.3). Subsequent significant changes to the scope can have an impact on the feasibility or desirability of a project and can result in the work being stopped.

5.3 International standardization

It is widely accepted that the purposes set out in 4.1.2 are most effectively and economically achieved by international standards. Where these can be established within reasonable timescales (i.e. typically less than three years) and can command the general acceptance of the international community, they are the preferred vehicle for voluntary public standardization in the UK. They also perform a major role in fulfilling the objectives of the World Trade Organization's "Technical Barriers to Trade" Agreement (WTO TBT) [1].

However, international standardization is sometimes not feasible due to significant natural, economic, cultural or political factors. In these cases standardization at a regional (e.g. European) or national level is more appropriate.

BSI, as the UK NSB, is a prominent member of both ISO and IEC, and participates fully to represent UK interests at all levels in those organizations. BSI has the right to adopt any international standard as a British Standard, but is not obliged to do so.

5.4 European standardization

The purpose of European standardization is primarily to support the single European market. In contrast to international standardization, it can have a quasi-regulatory role in certain cases. In these cases compliance with relevant technical provisions of a standard provides presumption of conformity to the essential requirements of one or more European Directives established under the "New Legislative Framework" (formerly, the New Approach – see A.33).

As the UK member of CEN and CENELEC, there is an obligation on BSI to:

- a) adopt without change all European standards ratified by those bodies;
- b) remove (by withdrawal or amendment) any conflicting provisions in pre-existing national standards; and
- c) subject to the specific provisions of the CEN/CENELEC Internal Regulations [N2], refrain from undertaking the development of any national standardization material that would be in conflict with ratified European standards, or those for which development has been approved (the European standardization policy known as "standstill").

Many European standards are developed in parallel with their international counterparts, or are direct adoptions of them. Others are based on international standards modified (by a process known as “common modification”) to reflect specific European market needs or conditions. There is close co-operation between the respective standards organizations.

5.5 Common features of international and European standardization

5.5.1 Technical committees

The standards development processes of ISO, IEC, CEN and CENELEC all operate on the basis of technical committees comprising national delegations appointed by member bodies. The UK participates actively in almost all such committees.

It is usual for each technical committee to be responsible for a range of standards, both published and in development, that falls within its scope. Technical committees report to the managing bodies of their respective organizations, and these are responsible for monitoring the overall work programme and arbitrating disputes about committees’ terms of reference and spheres of activity.

5.5.2 Working groups

Technical committees are frequently subdivided into more specialist subcommittees, and it is usual practice for the drafting of each project to be allocated to a group of experts usually known as a working group (WG).

NOTE Other terms, such as “maintenance team” or “project team”, are sometimes used for bodies set up by technical committees to undertake specific roles or tasks.

Working groups, each managed by a convenor appointed by the parent committee, are expected to work on the principle of consensus (see 7.5.3). Any political or commercial dispute that arises during the drafting process is expected to be referred to the parent committee for resolution, rather than impede the technical work.

5.5.3 Consultation with national bodies

The scale of participation in international and European standardization is such that it is impractical to apply the principle of consensus to all aspects of the development process. At specific stages (when a new work item is proposed [see also 5.2], during public consultation [see 5.8] and when the final draft is ready for approval [see 5.5.4]), the draft is referred back to national bodies which are invited to express their considered views on it by means of national votes. Although this process sometimes results in a strongly held national position being overridden, the voting thresholds are set sufficiently high for the characteristics of consensus (see 3.16 and 7.5.3) to underpin most international and European standards.

At the public consultation stage (often termed the “enquiry” or “comment” stage), national bodies are expected to have in place a mechanism by which the draft is made available for general public review.

The responses to the consultation are evaluated and used as the basis for preparing national comments. The comments generally inform the national vote, reflecting a view as to whether the draft should go forward for further development or whether the project needs fundamental reconsideration by the committee responsible for it.

In complex or contentious projects this stage might have to be repeated. However, this is discouraged because of the delays it causes.

National comments are reviewed by the responsible technical committee (a task which it is usually free to delegate). Assuming that the project passes the first voting stage, comments are referred to the working group for further refinement of the draft.

5.5.4 Final approval

When the technical committee is satisfied that a draft has been developed that takes due cognizance of national comments and is suitable for publication as a standard, it authorizes the voting stage, usually termed the “final” or “formal” vote. This is of shorter duration and is neither expected to involve wide national consultation nor to attract comments of a technical nature. National bodies are simply invited to register approval or disapproval, in the latter case to be supported by a technical justification.

5.6 UK participation in international and European standardization

It is generally expected that national member bodies will, as far as their needs and resources dictate, maintain national technical committees that reflect the same areas of interest as their international and European counterparts. These are usually termed “mirror committees”.

BSI committees (Clause 7) fulfil this function for the UK, as well as being responsible for standards of UK origin. They are responsible for appointing delegates to international and European technical committees and for identifying and selecting appropriate experts to participate in the working groups.

With few exceptions, all enquiry drafts, including those for amendments, are issued as BSI drafts for public comment (DPC) (see 5.8).

BSI committees are responsible for reviewing the responses to the public consultation, for compiling UK national comments and for advising BSI on the votes to be returned on each project (see 5.4).

In the event of serious legitimate concerns about the proposed content of a European standard, particularly in terms of safety or in cases of apparent conflict with UK legislation or regulations, procedures can be invoked to try to resolve them. In such cases, advice should be sought from BSI staff as early in the project as possible.

All those participating in work at international or European level are bound by the rules and protocols of the appropriate international or European standards body.

5.7 British Standards of UK origin

BSI is free to produce and maintain standards on subjects not covered by European standardization. In many cases these will be in areas in which there is fairly clear national consensus but for which a wider geographical consensus would be more difficult to achieve within a reasonable timescale. In other cases, standards are developed for use in the UK before being proposed for further development as European or international standards.

Standards of UK origin are expected to be developed within an 18-month timescale, and BSI usually applies a level of resource to help achieve this.

The development process is broadly similar to that for international and European standards, although there are no voting stages. Public consultation is an essential part of the process and the responses arising from it are reviewed in the same manner as for international and European projects.

5.8 Consultation – draft for public comment (DPC)

A draft for public comment is the principal means by which BSI discharges its responsibility to consult on the content of British Standards. It is used for all such projects (including draft international and European standards and UK national annexes to them) and for all amendments of a technical nature that might affect the application of a standard or the attestation of conformity to it.

A DPC is expected to be a mature draft, reflecting at least the proposed technical content of the standard. In addition to inviting comments on text proposed for publication, DPCs can be used to pose specific questions to seek opinions from a wider community on particular points.

DPCs are usually issued for a minimum period of two calendar months. Exceptionally, longer or shorter periods may be selected to reflect particular needs or circumstances. BSI endeavours to make DPCs easily available and encourages informed responses from any organization or individual. It reserves the right to dismiss offensive or vexatious comments or those that reflect a campaign on the part of a vested interest.

6 Publishing and maintaining standards

6.1 Publication

6.1.1 Principles

Standards should be developed only when there is a demonstrable need for them. Publication therefore needs to be achieved as quickly as is consistent with due care and scrutiny.

BSI aims to offer adequate information to assist users to select documents appropriate to their particular needs. For this reason, prior to the publication of a British Standard, the responsible technical committee is expected to identify a short list of key words likely to be readily understood by intended users.

BSI sells its standards through a wide range of distributors and in as wide a range of formats as can be commercially and technologically supported.

6.1.2 Adoption of international and European standards

The obligations set out in 5.4 regarding European standards are, in effect, legal obligations and therefore non-negotiable.

No such obligations apply in respect of international standards but BSI, as an active member of ISO and IEC, has a policy of adopting all international standards unless there are sound reasons to the contrary.

6.1.3 National forewords/annexes

Each UK adoption of an international or European standard has a national foreword which can be used to state and explain any concerns that the UK mirror committee might have about its content. It may not be used to modify or supplement the text of the standard, but it is permissible to offer advice and guidance on applying the standard in a UK context.

More extended advice and guidance may be provided in the form of a national annex. In certain cases (e.g. Eurocodes) the provision of national annexes containing nationally determined parameters and provisions is envisaged in the drafting of the European standard.

The need for a UK mirror committee to make any such statement is almost always foreseeable, and advice should be sought from BSI staff as early as possible. In general, national annexes containing significant technical material are subject to public consultation, although not necessarily at the same time as the international or European material to which they relate. With a few established exceptions, national forewords and national annexes are always informative in status.

6.1.4 Approval of publication

The status of British Standard can be conferred on a document only by a formal approval process as from time to time agreed by the BSI Board in accordance with the BSI Bye-laws.

The approval process is used to confirm that all relevant procedures and responsibilities have been discharged. It does not necessarily signify approval of a European text which BSI is obliged to adopt (see 5.4).

6.2 Maintenance

6.2.1 Principles

All British Standards are subject to review at least every five years. BSI aims to ensure that each British Standard falls under the responsibility of a standing technical committee that undertakes such reviews and considers any matters of concern brought to its notice at any other time.

If it is presented with evidence that one of its standards is unclear, inaccurate, disputable, or in any other way unfit for purpose, BSI endeavours to rectify the problem. The steps it takes will be proportionate to the severity of the risk posed, and urgent safety problems can be expected to receive urgent action. However, especially if it is necessary to make reference to a body outside BSI (e.g. a European or international standards committee), a less urgent problem might take many months or even years to be resolved.

Errors introduced during the production of a standard can be rectified by publication of a corrigendum. Trivial errors are usually left uncorrected until the need for a more substantial amendment arises.

6.2.2 Reviews

Reviews may be instigated at any time, either at the discretion of BSI or of the responsible technical committee.

Whilst the responsibility for reviewing a standard lies with the appropriate technical committee, a public consultation is always a feature of the process and the views of the committee will be informed by any responses to it. These responses are particularly important for assessing a standard's continuing fitness for purpose and market relevance.

A review usually results in a standard being confirmed for continued use, withdrawn, or revised.

A thorough revision can be a large-scale undertaking that requires considerable resource and commitment. In some cases, small-scale changes can be introduced by amendment.

In cases where it is not possible to undertake an adequate review (e.g. due to the lack of appropriate expertise), the standard is usually withdrawn.

6.2.3 Withdrawn publications

Withdrawal of a British Standard is at the discretion of BSI, but will not usually occur unless either a full review process has been undertaken or the standard is deemed to be in conflict with a European standard.

Withdrawn publications no longer carry the status of a British Standard. However, BSI continues to hold and protect the copyright over them. Recognizing that withdrawn publications can be important for research and litigation purposes, BSI endeavours to ensure that copies continue to be available for sale. BSI takes no responsibility for the content of a withdrawn publication.

7 BSI committees

NOTE See 3.9 for definitions of "committee" and "technical committee".

7.1 Principles

Development under the collective authorship of a committee is one of the defining characteristics of a British Standard.

A properly constituted and functioning technical committee provides:

- a) the means for effective representation of a wide range of interests;
- b) critical but constructive consideration and validation of technical and political standpoints; and
- c) dispassionate evaluation of submissions arising from public consultations.

Its decisions will be transparent and defensible, and made with due regard to the wider interests that are likely to be affected by them.

Each technical committee comes under the authority of the Standards Policy and Strategy Committee (SPSC), which is responsible for establishing it, determining its terms of reference and initial structure, and, if the need arises, disbanding it. SPSC may also choose to establish and empower senior committees to have oversight of specific sectors or areas of work and to co-ordinate the work of the relevant technical committees.

Each technical committee has clear and unambiguous terms of reference that define and delimit its role and scope of activity, so as to prevent encroachment on those of any other committee.

BSI has a responsibility to maintain a fair and comprehensive balance of interests within each committee. The nature of the balance necessarily varies from committee to committee, but a committee in which one type of interest has a predominant influence is likely to be regarded as unbalanced.

There are areas of work for which it is difficult to achieve representation from a wide range of interest groups. In these cases it is important that representation on a committee is not limited to a single interest. As a general rule, there should be active participation by at least two parties whose interests do not coincide.

SPSC is the ultimate arbiter in cases of dispute about representation on a committee or a dispute between committees concerning their respective work programmes or terms of reference.

7.2 Committee constitution

The development of a British Standard is a collective endeavour that needs to involve a wide range of legitimate interests.

Committees have also to be able to draw upon a sufficiently deep understanding of their subject and of the needs of those likely to use a standard.

One of BSI's objectives is to ensure that the committees fairly represent the range of interests affected by the standard, including users of the standard and consumers.

For practical reasons, as well as to achieve a fair balance of interests, committees have to be restricted to a manageable size and it is necessary to set certain criteria for membership.

It is generally expected that those sitting on a committee will:

- a) actively represent a collective body (nominating organization) that has a legitimate interest in the work of the committee; and
- b) be able to demonstrate expertise in some areas of the committee's work.

Other individuals, companies or organizations might be eligible for membership in an individual capacity if it can be demonstrated that their participation would be of wider benefit to the work of the committee and would not adversely affect the balance of decision making on it. Such membership is distinct from co-opted membership (see 7.4).

In exceptional circumstances, non-participating membership of a committee is permitted. This is only where an individual or organization can prove its need to monitor a particular work programme without being committed to full participation.

Committee membership is at the discretion of BSI. It cannot be claimed as of right. It is not normally granted to an organization or company seeking only to advance its own proprietary interest. Any individual or body deemed to be exploiting membership solely for its own commercial advantage is liable to be suspended or removed from membership.

The constitution of a committee comes under regular scrutiny by the committee itself and by BSI. Records are maintained of those invited to participate in its work. In order to encourage transparency, these records are made publicly available by BSI upon request. Anyone who considers that a committee does not represent the markets or interests affected by a particular standard can raise this with BSI using the complaints mechanism referred to in 8.7.

7.3 Nominating organizations

Nominating organizations are usually expected to:

- a) be formally constituted and have a defined scope or terms of reference consistent with those of the committee;
- b) have open and non-discriminatory membership criteria such as to permit representation of any UK interests that share their objectives;
- c) be an authoritative voice for a defined interest or group of interests affected, or potentially affected, by the work of the committee; and
- d) be committed to active support for the principle of consensus-based voluntary standardization.

Typically, nominating organizations are trade or industry associations, professional bodies, central and local government departments and agencies [for which the criteria in a) to d) do not apply], consumer organizations and user groups.

It is important that close and effective liaison is maintained between committee members and the organizations they represent. It is expected that comprehensive briefings and reports will be routinely exchanged and that nominating organizations will ensure that, directly or indirectly, those representing their interests are adequately resourced to do so.

A nominating organization is expected to notify BSI formally of any appointment it wishes to make, also stating the nominee's credentials for membership of the committee in question.

Organizations wishing to have more than one representative are expected to be able to justify such a request. This would be considered in the context of the overall size and balance of the committee (see 7.1 and 7.2).

7.4 Co-option for specific tasks

Individuals can be co-opted onto a BSI committee if they offer specialist technical expertise required for a specific project or work programme. They are not regarded as having membership in an individual capacity (see 7.2) and are neither expected nor permitted to represent any interest. Co-option is usually subject to the committee's approval, although BSI is empowered to co-opt because of its overall responsibility for a committee's constitution.

Co-opted members are expected to recognize that, at the chairman's discretion, their views might be taken into account only on those topics for which their particular expertise was originally sought.

7.5 Decision making

7.5.1 Principles

All committee decisions are made on the basis of consensus (see 7.5.3). This might entail meetings, but, in many cases, non-contentious decisions can be agreed by correspondence. In such cases, the processes and timescales need to be sufficiently transparent and accommodating to be able to withstand challenge.

7.5.2 Meetings

Meetings entail a considerable expenditure of resource and should not be convened without good reason. However, it is important that members have the opportunity to discuss complex or contentious matters as part of the consensus-building process.

Committees are encouraged to explore means that do not entail physical meetings, e.g. teleconferencing. Any such event is to be regarded as a formal meeting of the committee and it is important that this is made clear to all members in advance.

Adequate notice of a meeting needs to be given and all members should be given the opportunity to propose items of business for inclusion in the agenda.

Members unable to attend a meeting are expected to tender apologies for absence, which will be taken as an indication of continuing interest in its work. They are also encouraged to make written submissions for consideration during the meeting.

A nominating organization is entitled to be represented at a meeting by an adequately briefed alternate if its usual nominee is unable to attend. This does not, of right, extend to co-opted members or those acting in an individual capacity, although committee chairmen may exercise discretion on this point.

Infrequent attendance is likely to bring into question whether a member is adequately fulfilling the role set out in 8.2, and in such cases a nominating organization might be asked to offer an alternative nomination.

Decisions taken by those present at a formal meeting are binding on the entire committee and, other than in exceptional circumstances and at the chairman's discretion, business concluded at a meeting cannot be subsequently reopened by those who were not party to it.

The quorum for a committee meeting is three, not including members of BSI staff.

7.5.3 Consensus

The principle of consensus has its origins in the desire to achieve the general acceptance and application of a standard within its intended sphere of influence. This entails trying to ensure that the interests of all those likely to be affected by it are taken into account, and that individual concerns are carefully and fairly balanced against the wider public interest.

Achievement of consensus entails recognition of this wider interest and willingness to make reasonable compromises (see also 7.4 and 8.6). Trivial or vexatious objections are unlikely to gain support and may be over-ruled. However, where a member consistently maintains a fundamental objection and supports it with sound arguments, these concerns will be taken seriously.

If such objections are not voiced and sustained, normally within the context of a committee meeting where they can be put to the test, it will be assumed that consensus has been achieved.

7.5.4 UK delegates and experts in European and international bodies

The relevant BSI mirror committee usually selects delegations to formal meetings of international or European standards committees. Delegations are expected to receive a comprehensive brief from the mirror committee, and to reflect it faithfully when attending the meeting in question. If it is necessary to depart from a position established by the mirror committee, delegations should feel confident of being able to defend their actions (e.g. by reference to broader strategic considerations).

The selection of delegates should be informed by the nature of the business likely to be discussed at the meeting. It is desirable that the UK delegation has as thorough an understanding as possible of the topics under discussion, so that it can respond authoritatively to positions held by other national delegations.

National delegations seldom comprise more than three individuals, and resource constraints often dictate that only one is able to attend.

Those who are nominated by UK mirror committees to attend international or European working groups or similar bodies (see 5.5.2) are selected principally for their subject expertise. They are neither expected nor permitted to represent any interest group. They may be drawn from outside the committee membership, in which case they become co-opted members of the UK committee for the duration of the project. Before beginning their work, they are expected to have taken a brief from the UK mirror committee, preferably by attending a meeting so that they can understand the nature of the UK interest in it, and any particular position that the UK wishes to be reflected in the drafting work.

Delegates and experts attending any international or European standardization meeting are fully accountable to the respective UK mirror committee. They are expected to provide a succinct but comprehensive report of the outcomes of the meeting, with particular emphasis on matters of interest or concern to the UK committee. Where more than one delegate or expert attends the same meeting for the same purpose, a single report will usually suffice.

7.6 Minutes

Every formally constituted meeting of a BSI committee is minuted to record the following details:

- a) the time, date and place of the meeting;
- b) the organizations represented at the meeting;
- c) the organizations registered as members but not represented at the meeting;

- d) any changes to the constitution of the committee since the last meeting;
- e) any declared conflicts of interest;
- f) decisions, outcomes and actions agreed at the meeting; and
- g) any specific statement or standpoint requested to be recorded by an individual member.

Individual identities are indicated by initials agreed and understood by the members of the committee. Other than as agreed under item g), verbatim or extensive records of discussions are not taken. Formal minutes are not usually taken of meetings of panels, working groups or similar ad hoc groups. If they are, the same protocols apply as for minutes of committee meetings.

7.7 Disputes

Prolonged disagreements within a committee (or between committees) can be very damaging. Every effort should be made to resolve them quickly. Initially, it is the responsibility of the committee chairman to lead this task, with the support of the committee secretary and other BSI staff as appropriate.

If these efforts are not succeeding, and are unlikely to succeed within a reasonable timescale, BSI senior management should be alerted without further delay via the following e-mail address: BSOperationsDirector@bsigroup.com. A detailed investigation of the problem will be undertaken and remedial measures will be proposed.

If this fails to produce a durable solution, the problem will be referred to SPSC for resolution, the outcome of which is binding and final.

If consensus cannot be achieved regarding a UK vote in respect of an international or European standard, the time available often precludes an extended disputes resolution process. In such cases, a UK abstention will be formally recorded.

7.8 Legal advice

A committee should refer promptly to BSI if it identifies the need for advice on legal or regulatory matters.

7.9 External communication

The standards development process is, as far as is feasible, open and transparent to those not participating in it directly (see 4.4). However, in order to encourage the free exchange of views, it is expected that formal committee meetings will usually be held in private, and that individual views and standpoints will not be reported outside the meeting without the explicit consent of those involved.

Unless previously authorized by BSI, it is not acceptable for any committee member to issue a public statement (e.g. to the press or at a conference) that purports to reflect the collective viewpoint of a BSI committee or of BSI as an organization. BSI will not give any such authorization without first being satisfied of the committee's consensually established views on the subject.

Any requests for a committee member to give evidence in legal or administrative proceedings in respect of his or her membership of a BSI committee have to be notified immediately to BSI senior management via the following e-mail address: BSOperationsDirector@bsigroup.com.

7.10 Delegation of responsibilities

In consultation with BSI, a technical committee may choose to establish one or more subcommittees to take responsibility for particular aspects of its terms of reference. The technical committee is responsible for establishing the terms of reference, delegated powers and initial constitution of any such subcommittee, and for the appointment of its chairman. Such subcommittees function in all other respects according to the same principles that apply to technical committees.

A technical committee or subcommittee is also empowered to establish panels to undertake specific items or programmes of work. Panels are generally not standing bodies and are usually disbanded on the completion of their allotted tasks.

A panel is expected to work under the close supervision of the responsible committee or subcommittee. Its membership usually comprises individuals selected for their appropriate expertise and experience, drawn from the parent committee or co-opted as necessary. Panel members are neither expected to represent nor take a brief from any organization or company. The parent committee is expected to exercise vigilance over the composition of panels to ensure that they do not reflect any undue commercial influence or bias.

7.11 Intercommittee liaison

If a technical committee identifies a particular need to liaise with or be represented on another technical committee, it can nominate one of its members to sit in a representative capacity on the other committee, subject to the agreement of BSI. In such cases the provisions of 7.2, 7.3 and 7.7 apply to all parties as appropriate.

8 Roles and responsibilities

NOTE Attention is drawn to 4.1.6 which applies to all those involved in the development, publication and maintenance of British Standards.

8.1 BSI

BSI's principal responsibilities within the scope of this standard are outlined in 4.1.5, 4.2 and 7.1. In addition, BSI endeavours to:

- a) take effective steps to promote its activities as the NSB;
- b) maintain an influential presence in the governance and management of international and European standardization;
- c) make available a comprehensive training programme for the benefit of all those who directly participate in the standards development process; and
- d) maintain policies and internal procedures to support the effective discharge of all of these responsibilities.

8.2 Committee members

The role of members of a BSI committee is to:

- a) contribute their expertise and experience to the committee's standardization programme;
- b) represent on the committee the interests, aspirations and concerns of their respective nominating organizations (other than in the cases of individual or co-opted members, who have no representational function; see 7.4). See also 7.5.2.

All members of BSI committees, including those acting as chairmen or secretaries, have a responsibility to both BSI and to users of its publications. This requires due care and attention in the application of their expertise and experience and the representation of the interests that they represent. They are expected to:

- 1) act in good faith, with due diligence and vigilance, with a view to ensuring that their own and their colleagues' contribution to the committee's work is technically sound, free from commercial bias and consistent with the principles set out in this British Standard;
- 2) take full account of the considerations on intellectual property rights set out in 9.5.2;
- 3) make a formal declaration to the committee if any matter arises that could be judged to be a conflict of interest (see 3.13);

NOTE This does not apply in the case of representing the interests of a nominating body, but would, for example, apply in the case of promoting the interests of an employer, should these not coincide.

- 4) provide a brief summary of their expertise, experience and commercial interests; and
- 5) be able and willing to use electronic tools that are made available to expedite the committee's work.

8.3 Committee chairmen

8.3.1 Responsibilities

The chairman of a BSI committee holds a key position in BSI's work. He or she has an important set of responsibilities, including:

- a) leading the committee in its formal deliberations, with the objective of establishing consensus on all matters brought to it for a decision;
- b) ensuring that a UK standpoint is established on international and European standardization matters within the committee's terms of reference, and that effective measures are in place for representing those views in appropriate forums;
- c) contributing actively to strategic planning of the committee's activities and work programme;
- d) alerting BSI to any perceived imbalance in the constitution of the committee, or under-representation of important interests or expertise;
- e) in all of the committee's business, exercising judgement without bias, mindful of the far-reaching consequences that sometimes attach to a committee's decisions;
- f) ensuring that all those participating in the work of the committee are encouraged and able to have their views heard and respected;
- g) having regard to the reputation and standing of BSI and its work; and
- h) in consultation and conjunction with the committee secretary, or appropriate BSI contact point, taking all necessary and appropriate steps to ensure that the business of the committee is undertaken fully in accordance with this British Standard, particularly with due regard to the conduct required of committee members.

Those offering themselves for chairmanship should also be aware of the importance of thorough preparation for meetings and the need for attention to all documents presented to a committee. This, combined in many cases with being the principal interface between a committee and BSI staff, inevitably places greater demands on time than is usual for a committee member.

When appointed, it is usually expected that a chairman will relinquish the role of representing a particular organization or interest. Exceptions to this principle can be made only with the express consent of the committee and of BSI and may be subject to particular arrangements or protocols. It is recognized that, for reasons of financial or practical support, a chairman might need to maintain links with an organization represented on the committee. In such cases this should be made known to BSI and to all members of the committee.

8.3.2 Qualities

Whilst a chairman is expected to have at least the level of technical expertise that is commensurate with membership of the committee, it is not expected that he or she will necessarily be its pre-eminent technical expert. However, especially in the case of committees responsible for a wide subject range, it is desirable for a chairman to have a broad working knowledge of the committee's technical interests. It is also desirable to have an understanding of the application of the standards for which the committee is responsible, and of the markets in which they are used.

Together with being an effective communicator and competent manager of meetings, the principal qualities sought in a chairman are the abilities:

- a) to lead and listen;
- b) to assimilate and evaluate complex information quickly;
- c) to see all sides of an argument;
- d) to be able to reconcile opposing arguments and to forge an acceptable consensus; and
- e) to win and maintain the support and respect of colleagues.

8.3.3 Appointment of chairmen

Chairmen serve for terms of three years, which may be renewed by mutual agreement. They are appointed by their committees' immediately senior committees: in the case of a subcommittee, by the appropriate technical committee; in the case of a technical committee, by SPSC.

Appointments are usually made on the basis of a nomination by BSI staff, after an evaluation of candidates against the criteria discussed in 8.3.2. Interviews are often held for this purpose. It is usual to consult a committee as to its views on the chairmanship, but elections are not held and the committee's views are not binding on BSI.

Chairmen are usually appointed from within the committee membership, but there might be occasions when this is either not appropriate or not feasible. Prior membership of a committee is not an absolute requirement for appointment to its chairmanship.

8.4 Committee secretaries

Committee secretaries are responsible for ensuring that all necessary administrative arrangements are made in order for a committee to function efficiently and effectively. In particular they are responsible for:

- a) issuing notices and agendas for meetings;

- b) taking minutes of meetings and ensuring that actions arising are followed up;
- c) offering procedural advice; and
- d) acting as the principal interface with BSI.

Most committee secretaries are BSI staff members. Committee secretaries can be provided by industry through a formal agreement with BSI, in which case they are allocated a BSI contact person for advice, guidance and general interface.

Where neither of these arrangements apply, the functions of committee secretary are shared between a specific BSI team, the committee chairman and individual members of the committee, as from time to time agreed between them.

8.5 BSI staff

Unless representing an organization other than BSI, no member of BSI staff may participate in the decision-making processes (as defined in 3.19) of a technical committee.

BSI staff are permitted to offer relevant guidance and advice at any point in a committee's deliberations and are also empowered and expected to intervene in such deliberations if it becomes apparent that they are likely to lead to decisions that are illegal or potentially injurious to BSI's reputation.

It is particularly important that no member of BSI staff engaged in BSI's commercial activities, other than those of the NSB, has access to committee membership privileges that are not available to BSI's competitors operating in the same markets.

8.6 Conduct

Those participating in BSI's standardization work are expected to maintain high standards of commitment, personal conduct and professional integrity in all aspects of this work.

Those sitting on committees do so voluntarily and have a right to expect courteous and open-minded treatment by their colleagues and for their views to be duly considered and respected. They should also be able to rely on their colleagues' active participation and commitment and on their constructive approach to solving problems, removing obstacles to progress and achieving consensus.

Organizations represented on a committee are expected to liaise closely with their nominated representative in order for their viewpoints to be established and their interests pursued effectively. They are also expected to accept that it will sometimes be necessary for those interests to be put aside in order to achieve the higher purpose of developing standards that are ultimately of benefit to the entire community (see 7.5.3).

Those representing the UK in international or European forums have a particular responsibility to ensure that the UK's influence is not compromised by poor standards of advocacy, commitment or personal conduct.

BSI reserves the right to suspend or remove a committee member or nominating organization for any breach of these principles that is deemed to undermine its work or reputation.

8.7 Complaints

BSI has a complaints policy and a complaints procedure available to anyone who has cause for concern about its standards or the processes by which they are developed. Complaints may be sent to BSI senior management at the following e-mail address: BSOperationsDirector@bsigroup.com.

9 Content and drafting of standards

9.1 Principles

For a British Standard to fulfil the purposes set out in 4.1.2, it needs to be drafted in such a way that a user can be confident that all others applying the standard share the same understanding of its provisions.

It is fundamentally important for a standard to be:

- a) suitable for its intended aims and purposes;
- b) appropriate in content and language for its intended audience;
- c) clear and unambiguous;
- d) sufficiently accurate and precise for its intended purpose;
- e) capable of supporting legitimate claims of compliance and conformity (e.g. by containing only provisions that are verifiable) where appropriate to its stated purpose;
- f) not unduly restrictive (e.g. such as might result in stifling competition or impeding innovation);
- g) comprehensive within its intended scope and field of application (i.e. it does not omit any detail necessary for its effective application by an appropriately qualified user); and
- h) consistent with the law in all jurisdictions in which it is envisaged to be applied.

9.2 Relationship with the law

Standards are always subordinate to the law. It is important that they are drafted so as to avoid any confusion between the provisions of a standard and requirements imposed by law.

In general, it is not acceptable for standards to contain provisions that are already requirements imposed by law, nor to contain any statement recommending or requiring compliance with the law. It is also not advisable to quote legislation, and no attempt should be made to offer any interpretation of the law. Advice should be sought from BSI staff if circumstances arise where this appears to be necessary.

Reference to particular legislation is permissible where it is relevant and potentially helpful in applying the standard. Lengthy lists of legislation should be avoided as there is a risk that the user might believe any such list to be definitive and exhaustive. The user's attention should be drawn to the possibility that any reference to legislation might become out-of-date during the lifespan of the standard, and no reliance should be placed on it as being a definitive statement of a user's legal responsibilities or potential liabilities.

Particularly for the purpose of preventing anticompetitive effects or impeding innovation [see 9.1f)], whenever possible, provisions are expressed in terms of performance rather than design or descriptive characteristics.

NOTE A more detailed discussion of this principle appears in Annex A of each of the respective drafting rules (see 9.3.1).

9.3 Drafting

9.3.1 Drafting rules

The fundamental reference point for the drafting of all British Standards, of whatever origin, is the ISO/IEC Directives, Part 2, *Rules for the structure and drafting of international standards* [N1].

A modified version of these rules, the CEN/CENELEC Internal Regulations, Part 3, *Rules for the structure and drafting of CEN/CENELEC publications* is used for the drafting of European standards [N2].

British Standards of UK origin are drafted in accordance with the ISO/IEC Directives, Part 2 [N1], modified to alter, clarify or extend some of its provisions for easier, clearer use in the UK. These modified Directives are published as the *BSI Rules for the structure and drafting of UK standards* [N3].

NOTE A guide to the process of developing a standard of national origin [2] is published by BSI. The advice it contains is likely also to be of value to those involved in drafting international and European standards.

9.3.2 Language

Many standards, in dealing with highly specialized topics and addressing a very specialist readership, might necessarily use technical language not readily understood by non-specialists. Nonetheless, every effort has to be made to keep the tone of a standard clear, direct and free of jargon, and its structure intuitive to its intended users.

Most British Standards are originally drafted in English. However, taking account of the wider context in which these standards are developed and used, it should be noted that most of them are also likely to be translated into other languages. It is very important to guard against the possibility of mistranslation, or the introduction of ambiguities, deliberate or accidental.

9.3.3 Scope statement

The draft scope statement for a standard is expected to be developed prior to the formal project approval stage (see 5.2). Most projects are accepted onto the work programme on the basis of the scope statement submitted at the time, and subsequent changes to the scope will rarely be permitted without re-evaluation of the project.

The scope statement is an essential part of the early stage of the development of a standard, defining both the scope of the document and also the scope of the project to develop it.

The scope is a definitive statement of the type of standard (see 9.4.1), the subject being standardized, and its application. It should also indicate subject matter that a user might expect to be included but which is in fact excluded, and, where possible, direct users to where the subject is covered.

Whilst the scope statement should be short and succinct, it is important that it is worded to take into account the implications of the standard for its users, particularly in respect of the factors listed in 9.1, items a), f) and g).

9.4 Types of standardization publication

9.4.1 British Standards

British Standards (see 4.1.3 for a discussion of their defining characteristics) usually fit into one of the following types.

- A **specification** gives a coherent set of absolute requirements, each objectively verifiable. The result is a non-negotiable set of criteria for products, services or systems. It is particularly suited to giving the performance criteria demanded of a product, or the fundamental elements of a service or management system.
- A **code of practice** contains recommendations and guidance, where the recommendations relevant to a given user have to be met in order to support a claim of compliance. Users may also justify substitution of any of the recommendations in a code of practice with practices of equivalent or

better outcome. Depending on the context and field of application, a code of practice usually reflects current good practice as employed by competent and conscientious practitioners.

- A **guide** primarily contains information and guidance. It may also include recommendations where appropriate but these are generally of a nature that would not support reliable claims of compliance.
- A **method of test** provides repeatable and reproducible procedures with consistent outcomes for the assessment of material, product or process performance.
- A **method of specifying** gives characteristics of a material, product, process or system so that a customer can select the values needed before agreement with a supplier.
- A **vocabulary** is a compendium of terms and definitions, which helps harmonize the use of language within a given sector, field or discipline.
- A **classification** is an ordering of items or grading system for use across a given sector, field or discipline.

For standards of European and international origin, specifications, methods and vocabularies are the predominant models and less prescriptive standards are less common.

9.4.2 Non-standards publications

BSI, as the UK NSB, publishes other standardization documents that share many of the characteristics of a British Standard, but which do not qualify for that status.

These are usually developed under broadly the same processes as a British Standard, and issued under the authority of a technical committee. They are often used to deliver material supplementary to a British Standard (e.g. application advice, supporting data or research results).

Conversion of such a document to a British Standard requires the full consensus-building and public consultation processes associated with that status (see 4.1.3).

9.5 Intellectual property rights (IPR)

9.5.1 Principles

All the data, software and documentation set out in BSI standardization publications are the property of and are copyrighted by BSI, or of some other person or entity that owns copyright in the information used, and has licensed such information to BSI for its commercial publication and use.

This is particularly important where details of IPR-protected technology are intended to be incorporated in a standard.

For international and European standards, the rules and procedures of the relevant international and European body governing the inclusion of intellectual property apply.

As a general principle, BSI does not perform any check on the status and validity of any essential IPR (see 3.24) notified to BSI. In addition, BSI does not perform any search for essential IPR that might exist and has not been notified.

9.5.2 IPR in contributions

For the purposes of this subclause, IPR refers to copyright. However, where any other type of IPR forms part of a committee member's contribution(s), the same principles apply.

The collaborative work of the committee will lead to the creation of new work(s). BSI only accepts contributions from committee members and others in the preparation of national standards and related documents on the following terms.

- a) The committee member has the right to submit his or her contribution to the standards-making process, or the right to submit a contribution subject to the IPR of a third party where he or she has obtained that right in the contribution from the owner of the IPR, and an acknowledgment to this effect is made in the foreword of the new works.
- b) IPR in any new works that may result from the standards-making process are exclusively and irrevocably assigned to BSI or the international and European standards organizations as the case may be.
- c) This assignment supersedes any competing rights in the new works that the committee members or any third parties may have.
- d) Such assignment by committee members extends to exploitation of the IPR by BSI throughout the world.
- e) The committee member accepts that exploitation of his or her contribution will take place without mention of his or her name.

A committee member retains the IPR in his or her own unique contribution providing that the contribution existed prior to its submission to the standards-making process. For the avoidance of doubt, in such cases the following principles apply:

- 1) any use of such contribution by the committee member may not adversely affect the promulgation and exploitation of the standard by BSI; and
- 2) a committee member continuing to use his or her own unique contribution(s) may not reference the standard as the source.

9.5.3 Use of standards content

Committee members are entitled to use relevant content published and owned by BSI as part of the standards-making process and in accordance with BSI policies.

Use of BSI's published content by committee members outside the scope of the standards-making process requires approval by BSI and may entail payment of a fee.

9.5.4 Patents and third-party IPR

9.5.4.1 General

For the purposes of this subclause, IPR in particular refers to patents. However, where, in practice, any other type of IPR gives the IPR holder control over the use of the standard, the same principles apply.

9.5.4.2 Good faith disclosure obligation

Committee members are expected to use reasonable endeavours to inform the responsible committee in good time if either or both of the following come to their notice:

- a) any third-party IPR, for example a patent, that appears to be relevant to the standard under development;
- b) any claim that third-party IPR is applicable to a standard, whether published or still under development.

In addition, a committee member who represents a third party who might be the owner of IPR (or who might have any claim in respect of IPR), whether published or still under development, that might be relevant to the standard under development, is under an on-going obligation to use reasonable endeavours to identify IPR owned by that third party (or any claim in respect of IPR) that may be essential for the implementation of the standard under development.

Where the committee member identifies such IPR (or such a claim) he or she is obliged to inform the responsible committee of any such IPR (or claim). Where the disclosure involves a potential claim it might be sufficient to make a declaration that the third party is likely to have IPR claims over the technology (without identifying specific claims or applications for IPR).

9.5.4.3 Formal calls for disclosure

A formal call to identify all essential IPRs will be made at the following stages during the development of each standard:

- a) when a new work item is publicly announced;
- b) before a draft standard is released for public comment; and
- c) during, or immediately prior to, the final approval process of the standard.

9.5.4.4 Disclosed essential IPR

BSI will work with the committee to agree the best way to address such IPR or claims. This may include requesting further information from the third party such as the most restrictive licensing terms of any IPR. In assessing whether such IPR might be included as a requirement of a standard of national origin it is reasonable for the committee to take account of the most restrictive licensing terms of any IPR.

Where IPR relating to a particular standard is identified, BSI will immediately request the owner of such IPR to give, within three months, an irrevocable undertaking in writing that it is prepared to make its IPR available to all users of the standard on fair, reasonable and non-discriminatory (FRAND) terms and to ensure that any entity to which the IPR holder transfers its IPR is similarly bound by this commitment.

Any such third-party IPR will not be considered to be essential unless the IPR holder irrevocably commits to make its IPR available to all users on FRAND terms, and to ensuring that any entity to which the IPR holder transfers its IPR is similarly bound by this commitment.

If such third-party IPR holder is unwilling to provide this commitment, BSI and the relevant committee will assess the appropriate action to be taken. This may include reviewing the standard to see if a viable alternative technology is available.

A note drawing attention to essential third-party IPR will appear at the appropriate point in the published standard. This may include a summary of the most restrictive licensing terms which the IPR holder has indicated would be applicable to the IPR.

Annex A
(informative)**Glossary of common terms in standardization****A.1 acceptance**

process by which new work proposals are assessed for inclusion in the BSI work programme

A.2 ASD-STAN

European Association of Aerospace Industries

A.3 AFNOR**Association Française de Normalisation**

French National Standards Body

A.4 ANEC**European Association for the Co-ordination of Consumer Representation in Standardisation**

organization promoting and defending consumer interests in the processes of standardization and certification, and in legislation related to standardization and certification

A.5 BT**Bureau Technique**

technical board established in both CEN and CENELEC to oversee the work programmes of each organization

A.6 CD**Committee Draft**

(drafting) stage in the development of ISO and IEC standards

A.7 CDV**Committee Draft for Voting**

development stage in the IEC system, equivalent to the DIS (A.15) in the ISO system, at which a draft is made available for an extended comment period, and which also attracts a vote from each P-member (A.36)

A.8 CECC

CENELEC Electronic Components Committee

A.9 CCMC**CEN/CENELEC Management Centre**

administrative offices of CEN and CENELEC

A.10 CEN publication

publication resulting from the technical work of CEN and made available by CEN, i.e. European Standards, Technical Specifications, Technical Reports, Guides and CEN Workshop Agreements

A.11 chairman

formally appointed leader of a committee

- A.12 committee**
representatives from business, industry, government, academia, consumers and other groups, brought together for the development of standards
- A.13 CWA
CEN (or CENELEC) Workshop Agreement**
CEN/CENELEC agreement, developed by a workshop, which reflects the limited consensus of identified individuals and organizations responsible for its contents
- A.14 DIN
Deutsches Institut für Normung**
German National Standards Body
- A.15 DIS**
Draft International Standard, in the ISO system (equivalent to the CDV stage in IEC)
- A.16 DKE
Deutsche Elektrotechnische Kommission im DIN und VDE**
German electrotechnical standards body
- A.17 Dresden Agreement**
co-operation agreement between the IEC and CENELEC
NOTE The agreement relates to common planning of new work and parallel IEC/CENELEC voting. The main goal of the agreement is to avoid duplication of efforts, accelerate the standards development process and ensure the best use of resources available.
- A.18 EC**
European Commission
- A.19 ECISS**
European Committee for Iron and Steel Standardization
- A.20 EEA
European Economic Area**
economic market including the EU and EFTA
- A.21 EFTA
European Free Trade Association**
free trade organization of four countries in Europe but not in the EU
- A.22 EU
European Union**
economic and political union of 27 member states in Europe
- A.23 European Directive**
legislative instrument within the European Union (EU) which is binding for Member States regarding the objectives to be achieved, but which leaves national authorities the choice of form and methods used to attain those objectives

A.24 FDIS

Final Draft International Standard, in the ISO and IEC systems, i.e. the final voting stage

**A.25 HD
Harmonization Document**

[in CENELEC] set of technical requirements that have to be adopted by each member body, either by direct transposition (as with an EN), or by being incorporated within the existing body of national standards (by amendment or revision)

A.26 harmonized standard

technical specification adopted by European Standards Organizations, developed under a mandate given by the EC and/or EFTA, in support of essential requirements of a New Approach Directive

**A.27 IR
Internal Regulations (of CEN/CENELEC)**

rules of the European standards bodies

A.28 mandate

political request from the EC and/or EFTA, agreed upon by the Member States (generally via a decision of the Standing Committee of the Directive 98/34), addressed to CEN, CENELEC or ETSI, in support of an action from the EC

NOTE This can be in support of legislative work such as a directive (some directives, not all, are "New Approach" Directives), or in support of an industrial policy action from the EC.

A.29 MB

member body (of ISO, IEC, etc.)

A.30 national deviation

modification of, addition to or deletion from the content of an EN (and HD for CENELEC), made in a national standard within the same scope as the EN (and HD for CENELEC)

NOTE It does not form part of the EN (and HD for CENELEC).

A.31 national mirror committee

national committee monitoring European/international technical committee work to ensure the formulation of a coherent national position

A.32 NC

National Committee

A.33 New Approach Directive

directive that has been put into force since May 1985 by the Council of the European Communities which defines "legislative harmonization in those sectors where barriers to trade are created by justified divergent national regulations concerning the health and safety of citizens and consumer and environmental protection, will be confined to laying down the 'essential requirements', conformity with which will entitle a product to free movement within the Community"

NOTE The New Approach has been integrated into the New Legislative Framework for marketing of products (http://ec.europa.eu/enterprise/policies/single-market-goods/regulatory-policies-common-rules-for-products/new-legislative-framework/index_en.htm).

**A.34 O-member
observer member**

non-voting national member of an ISO or IEC committee

**A.35 OJEU
Official Journal of the European Union**

official publication of the Institutions of the European Union

**A.36 P-member
participating member**

voting national member of an ISO committee

A.37 parallel voting

procedure under the Vienna Agreement for draft standards developed with either CEN- or ISO-leadership which permits approval of draft standards by both organizations within the same time period

NOTE 1 Parallel approval is considered to take place at two stages: although no vote is taken within CEN at the enquiry stage, the CEN enquiry equates to the ISO/DIS vote; the CEN formal vote equates to the ISO/FDIS vote.

NOTE 2 A similar procedure exists for IEC and CENELEC.

**A.38 prEN
draft European standard**

**A.39 PQ
Primary Questionnaire**

procedure used for an entirely new reference document, in order to find out whether enough interest exists in harmonization of the proposed subject, the existing degree of national harmonization with the reference document in question and whether that document would be acceptable as an EN or TS

A.40 private circulation

distribution under the principle that material presented or circulated to a committee is not in the public domain, and that dissemination should, as far as practically possible, be limited to those who have a legitimate interest in the development of the standardization projects to which it relates

NOTE This principle does not preclude due consultation on such material within organizations represented on the committee. For this reason it has to be recognized that absolute confidentiality cannot be guaranteed and BSI can offer no assurances in this respect. Those submitting commercially sensitive material do so at their own risk.

**A.41 SMB
Standardization Management Board (IEC)**

**A.42 TMB
Technical Management Board (ISO)**

A.43 UAP
Unique Acceptance Procedure

procedure applied to any type of document, whatever its origin, in order to achieve rapid approval as a European Standard, and for which there is an expectation of it being acceptable at European level with little or no change

A.44 UQ
Updating Questionnaire

procedure used for an existing reference document, in order to find out whether enough interest exists for further development

A.45 Vienna Agreement

agreement on exchange of technical information between ISO and CEN, approved by the CEN Administrative Board on 27 June 1991 in Vienna

A.46 Vilamoura Agreement

procedure whereby any new national electrotechnical work has initially to be offered to CENELEC as a proposal for a European standard, and made open to participation by other CENELEC members

A.47 weighted voting

voting system applied for the approval of European Standards, whereby the votes of each CEN/CENELEC member are weighted according to a pre-determined formula (see CEN/CENELEC Internal Regulations, Part 2:2002)

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