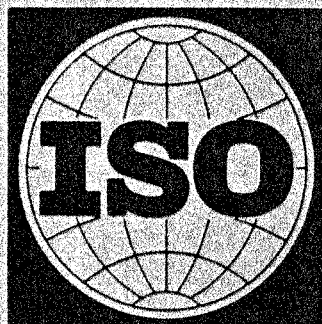


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GUIDE 2

Third edition — 1980-02-15

General terms and their definitions
concerning standardization and
certification

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards institutes (ISO member bodies). The work of developing International Standards is carried out through ISO technical committees. Every member body interested in a subject for which a technical committee has been set up has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work.

ISO Guides are intended essentially for internal use in ISO committees or in some cases for the guidance of member bodies when dealing with matters which would not normally be the subject of an International Standard.

ISO Guide 2 was drawn up by ISO/STACO. The first edition, containing a "first series" of terms and definitions (marked with an asterisk in this edition), was circulated to the member bodies for comment in June 1975. The document secured the necessary support of the member bodies, and was subsequently accepted by the ISO Council.

A "second series" of terms and definitions was circulated to the member bodies for comment in January 1977 and, in a revised form, in April 1977. The document secured the necessary support of the member bodies and was subsequently accepted by the ISO Council for publication together with the "first series", in the form of the second edition of ISO Guide 2.

The "third series" was circulated to the member bodies for comment in July 1977 and, in a revised form in May 1978. It was then discussed at the STACO meeting in May 1978 and in CERTICO in July 1978. A revised text was circulated in January 1979 to STACO and CERTICO for approval by correspondence and to all ISO member bodies. It secured general support of the member bodies and was subsequently accepted by the ISO Council for publication together with the first two series, in the form of the third edition of ISO Guide 2.



General terms and their definitions concerning standardization and certification

0 Introduction

This guide is the third edition of a guide published in 1976. It contains a comprehensive set of general terms concerning standardization and certification. These definitions have been prepared in three steps. As a first step, definitions for some terms were prepared in the United Nations Economic Commission for Europe in close co-operation with ISO, primarily to facilitate the work of the Economic Commission for Europe aimed at the removal of barriers to international trade arising from lack of harmonization of standards or inadequate international application of standards. The terms and definitions from this first series, adopted by ECE and ISO, are marked with an asterisk in the present edition.

The second series of terms and definitions had a general character and was also intended, *inter alia*, to contribute towards mutual understanding between standards bodies and governmental authorities.

As a third step, a series of terms and definitions related to the different types of standards and some aspects of certification were prepared in ISO/STACO and ISO/CERTICO respectively.

The different types of standards defined in this Guide are primarily those for which widely used terms exist and for which definitions are necessary because of evidence of divergent interpretations (for example product standard, performance standard). In some cases, a choice had to be made among several terms which are almost equivalent (see the notes to the definition of the term "basic standard"). In other cases, some concepts were well known, but no generally accepted term was available. It was therefore necessary to find some terms in order to make a distinction, whenever necessary, between such types of standards (for example variety control standard).

The terms commonly in use lay emphasis on elements associated with a variety of approaches, which means that these types do not belong to a single hierarchy of standards. This emphasis is arbitrary in that a standard may often be categorized as being of more than one type. For example, a product standard may simultaneously be a performance standard or a descriptive standard; or it may also be a variety control standard and an interface standard; a basic standard may also be a terminology standard; or an interface standard a safety standard.

1 Standardization

1.1 General terms

1.1.1 standardization : An activity giving solutions for repetitive application, to problems essentially in the spheres of science, technology and economics, aimed at the achievement of the optimum degree of order in a given context. Generally, the activity consists of the processes of formulating, issuing and implementing standards.

NOTE — An important benefit of standardization is improvement of the suitability of goods and services for their intended purposes.

1.1.2 consensus : General acceptance implying the absence of strong opposition by an important part of the interests concerned to substantial issues.

1.1.3 variety control : The selection of the optimum number of sizes, other characteristics or types of a product, required to meet prevailing needs.

1.1.4 fitness for purpose : The ability of a product, a process or a service to fulfil a defined purpose under specific conditions.

1.1.5 performance characteristic : A characteristic of fitness for purpose in direct relation to the behaviour of the product in use, without stating features related to manufacture.

1.1.6 performance test : A test for assessing a performance characteristic directly or through simulation of the influencing factors occurring in use, sometimes under more severe conditions.

1.1.7 descriptive characteristic : A characteristic of fitness for purpose stating features related to the manufacture of the product (usually describing constructional details with dimensions and material composition).

1.1.8 interchangeability : The suitability of a product (products) to be used in place of another product (products) to fulfil the relevant requirements.

NOTE — The functional aspect of interchangeability is called "functional interchangeability", and the dimensional aspect, "dimensional interchangeability".

1.1.9 compatibility : The suitability of products or systems to be used together under specified conditions to fulfil the relevant requirements without causing unacceptable interactions.

1.1.10 tolerance : The permissible variation of the specified value of a quantity.

NOTES

1 According to needs, "tolerance" may be expressed as :

- a) the difference between permissible maximum and minimum values; or
- b) the difference between the permissible maximum value and the nominal value, and the difference between the permissible minimum value and the nominal value (plus and minus tolerances).

2 The term "tolerance" also has the meaning of the permissible portion, in a lot, of products not in conformity with the relevant requirements.

1.1.11 code : A symbolic mode agreed upon for representation of objects or concepts. It generally consists of letters, numerals, signs, symbols, colours, or a combination thereof.

NOTE — The term "code" also has the meaning of a compilation of technical or other provisions and in this sense is used in expressions such as "code of practice" or "boiler code".

1.1.12 designation : A name, symbol, code, or a combination thereof identifying products, groups of products or other subjects, concrete or abstract.

1.1.13 marking : Application of indications on a product or on a package primarily for the purpose of identifying the product and/or certain features of the product.

NOTE — Such indications may include : marks of origin, identification marks, marks of conformity, characteristics of the product, etc. Marking may also be applied to equipment employed in transferring a product to the user; for example, dispensers such as petrol pumps.

1.2 Standards and regulations

1.2.1 technical specification* : A document which lays down characteristics of a product or a service such as levels of quality, performance, safety, dimensions. It may include terminology, symbols, testing and test methods, packaging, marking or labelling requirements. A technical specification may also take the form of a code of practice.

1.2.2 standard* : A technical specification or other document available to the public, drawn up with the co-operation and consensus or general approval of all interests affected by it based on the consolidated results of science, technology and experience, aimed at the promotion of optimum community benefits and approved by a body recognized on the national, regional or international level.

NOTES

1 A technical specification which does satisfy all the conditions given in the definition may sometimes be called by other names, for example : "recommendation".

2 In some languages the word "standard" is often used with another meaning than in this definition, and in such cases, it may refer to a technical specification which does not satisfy all the conditions given in the definition, for example : "company standard".

* Terms marked with an asterisk appeared in the first edition.

1.2.2.1 harmonized standards* : Standards of the same scope that have been approved by different standardizing bodies and which are either technically identical or recognized as technically equivalent in practice.

NOTE — Harmonization of standards is generally carried out in order to prevent or eliminate technical barriers to trade in the region of the world in which they are applied.

1.2.2.2 mandatory standard* : A standard of which the application has been made mandatory by a regulation.

1.2.2.3 national standard* : A standard adopted by a national standards body.

1.2.2.4 international standard* : A standard adopted by an international standards organization or in certain cases a technical specification adopted by an international standardizing body.

1.2.2.5 regional standard* : A standard adopted by a regional standards organization or in certain cases a technical specification adopted by a regional standardizing body.

1.2.3 code of practice : A document describing recommended practices for the design, manufacturing, setting up, maintenance or utilization of equipment, installations, structures or products.

NOTE — The term "specification" is currently used in many national standards bodies with the same meaning as the term "technical specification" save that it does not include codes of practice.

1.2.4 regulation* : A binding document which contains legislative, regulatory or administrative rules and which is adopted and published by an authority legally vested with the necessary power.

1.2.5 technical regulation* : A regulation containing or referring to a standard or a technical specification.

NOTE — A technical regulation may be supplemented by technical guidance which outlines some way(s) to fulfil the regulation.

1.2.6 reference to standards* : A method of drafting a regulation in such a way that a detailed statement of technical specifications is replaced in the text by referring to one or more standards.

1.2.6.1 reference to standards by exact identification* : A method of reference to standards by designating one or more specific standards in such a way that later revisions of the standard or standards will not be applied unless the regulation is modified.

NOTE — The standard is usually designated by its title, number and edition or date.

1.2.6.2 reference to standards by undated identification* : A method of reference to standards by designating one or more specific standards in such a way that later revisions of the standard or standards will be applied without the necessity of modifying the regulation.

NOTE — The standard is usually designated only by its title and number.

1.2.6.3 general reference to standards* : A method of reference to standards by referring in a general way to present or future standards.

NOTE — This general way normally means that the relevant regulation includes a general clause so that all the present or future standards in a specific field are regarded as meeting the aim of the regulation.

1.3 Types of standards

1.3.1 basic standard : A standard having a wide ranging coverage or containing general provisions for one particular field.

NOTES

1 A basic standard may function as a standard of direct application, or as a basis for other standards.

2 The term "fundamental standard" is sometimes used to stress the fundamental character of a basic standard.

3 The term "general standard" is sometimes used to stress the general applicability of a basic standard.

* Terms marked with an asterisk appeared in the first edition.

1.3.2 product standard : A standard specifying some or all of the requirements to be met by a product or a group of products in order to ensure their fitness for purpose.

NOTES

1 A product standard may include, in addition to requirements, directly or by reference, aspects such as terminology, sampling, testing, packaging and labelling, and sometimes processing requirements (process standards as such are covered by the term "code of practice").

2 A product standard can be either complete or not, according to whether it specifies all or only a part of the necessary requirements.

1.3.2.1 performance standard : A product standard specifying requirements for one or more performance characteristics.

1.3.2.2 descriptive standard : A product standard specifying requirements for one or more descriptive characteristics.

1.3.2.3 variety control standard : A standard aimed at variety control, generally containing a series of selected values or attributes of a product.

1.3.3 service standard : A standard specifying some or all requirements to be met by a service in order to ensure its fitness for purpose.

NOTE — Service standards may be established in fields such as dry-cleaning, laundering, hotel trade, car servicing, communication (post, telegraph, telephone), insurance, banking, trading.

1.3.4 safety standard : A standard aimed at the safety of people and goods.

NOTE — A safety standard generally contains requirements based on the optimum assessment of a number of factors, including non-technical factors such as human behaviour, that will lead to the highest practical degree of safety.

1.3.5 interface standard : A standard specifying requirements concerned with the compatibility of products or systems at their points of communication.

1.3.6 standard on supplier's data : A standard containing a list of characteristics for which values or other data are to be stated by the supplier.

1.3.7 terminology standard : A standard concerned exclusively with terms, usually accompanied by their definitions and sometimes by explanatory notes, illustrations, examples, etc.

1.3.8 testing standard : A standard concerned exclusively with test methods, sometimes supplemented with other provisions related to testing, such as sampling, use of statistical methods and sequence of tests.

1.4 Bodies

1.4.1 standardizing body* : A body, governmental or non-governmental, one of whose recognized activities is in the field of standardization.

1.4.1.1 international standardizing body* : A standardizing body whose membership is open to all countries of the world.

1.4.1.2 regional standardizing body* : A standardizing body whose membership is usually limited to certain countries from a given region of the world.

1.4.2 standards body : A standardizing body recognized at national, regional or international level whose principal function, by virtue of its statutes, is the preparation and/or publication of standards and/or approval of standards prepared by other bodies.

1.4.2.1 national standards body* : A nationally recognized body whose principal function at the national level, by virtue of its statutes or the law of the country, is the preparation and/or publication of national standards and/or approval of standards prepared by other bodies. This body is eligible to be the national member of the corresponding international and regional standards organizations.

* Terms marked with an asterisk appeared in the first edition.

1.4.2.2 international standards organization* : An organization, governmental or non-governmental, whose membership is open to all countries of the world and whose principal function, by virtue of its statutes, is the preparation and/or publication of standards and/or harmonization of the standards of its members.

1.4.2.3 regional standards organization* : An organization, governmental or non-governmental, whose membership is usually limited to certain countries from a given region of the world and whose principal function, by virtue of its statutes, is the preparation and/or publication of standards, and/or the harmonization of the standards of its members.

2 Certification

2.1 Conformity

2.1.1 conformity with standards or technical specifications* : The conformity of a product or a service with all the requirements of specific standards or technical specifications.

2.1.2 administrative procedure for determining conformity* : The administrative measures needed to determine whether or not a product or a service is in conformity with specific standards or technical specifications. It may include administrative arrangements for controlling the frequency and location of testing, for carrying out tests and for supervising the control of quality by producers.

2.1.3 certificate of conformity* : A document attesting that a product or a service is in conformity with specific standards or technical specifications.

2.1.4 mark of conformity* : A mark attesting that a product or a service is in conformity with specific standards or technical specifications.

2.1.5 conformity certification* : The action of certifying by means of a certificate of conformity or mark of conformity that a product or service is in conformity with specific standards or technical specifications.

2.1.6 self-certification* : A form of conformity certification in which one or more manufacturers are responsible for conformity certification of their products with no surveillance from any certification body.

2.2 Systems

2.2.1 certification system* : A system having its own rules of procedure and management, for carrying out conformity certification.

2.2.1.1 national certification system* : Certification system organized and managed by a governmental or non-governmental body on a national level.

2.2.1.2 international certification system* : Certification system organized and managed by a governmental or non-governmental international organization whose membership is open to all countries of the world.

2.2.1.3 regional certification system* : Certification system organized and managed by a governmental or non-governmental regional organization whose membership is usually limited to certain countries from a given region of the world.

2.2.1.4 third party certification system* : A certification system managed by a certification body or under its surveillance.

2.2.1.5 mandatory certification system : A certification system, the application of which has been made mandatory by a regulation.

* Terms marked with an asterisk appeared in the first edition.

2.2.2 certification scheme : Part of a certification system relating to a certain product or group of products to which the same particular rules (such as rules on type testing, assessment of the manufacturer, product surveillance and/or production surveillance) and the same procedure apply.

NOTE — The term "certification program(me)" covers the same concept as "certification scheme".

2.2.3 certification body* : An impartial body, governmental or non-governmental, possessing the necessary competence and reliability to operate a certification system, and in which the interests of all parties concerned with the functioning of the system are represented.

2.2.4 approval : Declaration by a body vested with the necessary authority that a set of published criteria has been fulfilled.

2.2.5 type approval : Approval of a certain product or group of products considered by the approval body as representative for the continuous production.

2.2.6 access to a certification system : The opportunity to obtain certification under the rules of the system.

2.2.7 participation in a certification system : Status of a certification body which has undertaken the obligations and obtained the rights to certify and accept conformity certification under the rules of the system without taking part in the management of the system.

2.2.8 membership in a certification system : Status of a certification body which has undertaken the obligations and obtained the rights to certify and accept conformity certification under the rules of the system and which takes part in the management of the system.

2.2.9 certification arrangement : An arrangement which establishes the mutual acceptability of certification systems or related procedures in order to facilitate trade.