



Guidelines to assist members of standards committees in preparing user-friendly European Standards.



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## 1. Foreword

*IFAN Guide 3 was first published in 2008 and was widely adopted and was the basis for CEN/CENELEC Guide 17, developed by CEN/CLC BT WG 208 of which IFAN is a member, and the first edition was published in 2010. However the members of the IFAN European Group felt that it is still useful to highlight the particular elements of the guide which are important to standards users, and we hope will be taken into account by standards writers and developers.*

When participating in European standards work as a national delegate, you cooperate with representatives of other national standards bodies to prepare European Standards. However you, as an expert in the field, will probably not be the "real" user of the resulting standards. For example, if you are a materials expert, "your" standards will be used especially by people in the engineering and purchasing departments, and their companies can range in size from very small enterprises to large groups, and may even belong to different industry sectors. In addition, since you are an expert in the subject to be standardized, you have much more background information than the normal standards user. Therefore, the resulting standards may concentrate too much on the technical details of the subject, often neglecting the application aspects. Therefore the aim of these Guidelines prepared by the International Federation of Standards Users (IFAN) is to provide support for your role in standards development, for the benefit of ALL users of the standards being developed, as it is the mission of IFAN, to encourage the implementation of standards.

## 2. Objectives

It is the aim of these Guidelines to help to:

- Make European Standards as user-friendly as possible
- Keep a high quality of European Standards

in order to minimize the problems and costs of implementing standards for trade and industries and the various other sectors, particularly for small and medium sized enterprises. The intention is also to achieve a high level of implementation by appropriate organizations such as regulators, governmental and non-governmental agencies or service providers, and to support training and education.

On the basis of the reference documents for preparing standards which are listed in clause 5, a checklist has been developed from the perspective of standards users to help standards writers to achieve these objectives; see clause 4.

It complements other instruments relating to drafting standards.

The application of this checklist may take into account sector specific and organizational diversity.

## 3. Standards Requirements

It is the purpose of a European Standard to establish clear and unambiguous provisions which facilitate trade and communication. To this end, a European Standard needs to:

- be as exhaustive as necessary within the limits of its scope;
- take into full account of current technology and science;
- provide a basis for subsequent technological development;
- have been prepared with user and consumer acceptance in mind;
- make correct use of the appropriate phrasing and terminology (e.g., verb forms for mandatory aspects);
- be comprehensible to qualified users who have not been directly involved in its preparation.

In addition to the existing rules for standardization work and drafting of standards published by the relevant standards organizations (see clause 5), these Guidelines are intended as a comprehensive tool to assist experts, chairpersons and secretaries of European standards committees in preparing user-oriented standards. These Guidelines were developed on the basis of years of experience of users mainly in trade and industry of implementing European Standards which replace previous widely used national standards in their companies. They have been established in recognition of the requirement for standards to be as user-friendly as possible. If the benefits of standardization are to be achieved, it is a prerequisite that European Standards be accepted and used widely.

## 4. Checklist

### 4.1 Substance

#### 4.1.1 Is the structure and wording of the European Standard understandable by all kinds of users?

In the course of developing a standard, members of standards committees need to bear in mind the fact that standards are used by a wide range of people with different levels of knowledge, for different applications and in different environments, therefore

- A standard needs to be comprehensible to qualified persons who have not been directly involved in its preparation, and avoid the use of jargon if possible.

**Summary: Avoid incomprehensible wording in standards.**

#### 4.1.2 Are the extent/scope of the standard user-friendly?

Voluminous standards are definitely not user friendly neither with respect to handling nor financially:

- A standard with a very extensive scope may require frequent revision, e.g., to take into account new variants, and should be split into user-friendly parts;
- Amendments in response to news variants should be avoided.

**Summary: Aim to produce standards of a usable size. (see also 4.1.4)**

#### 4.1.3 Does the field of standardization involve several inter-related standards?

Fields of standardization which include several inter-related standards replacing national standards should be treated as a “package” at the European level, as explained below. Otherwise, as the adoption of a European Standard is compulsory after its publication, the situation will arise that, in the case of linked standards, the remaining national standards are no longer self-consistent. This happens because then there exists a mix of previous national and new European Standards which may not be well suited to each other. In the case of the package approach a special provision applies, by which the relevant national standards are not required to be withdrawn until the last standard in the “package” has been adopted. This means that, for a transitional period, two standards on the same subject may exist simultaneously at a national level. Users can then choose either to continue working with the original standard or to change to the new one. It only becomes mandatory for conflicting national standards to be withdrawn at the end of the transition period when the package of standards has been completed. Hence the concept of packages of ENs require one to:

- bear in mind that a European “package” of standards is defined as a group, as small as possible, of inter-related standards in the scope of one (or more) TCs at the European level, to be constituted by a TC on a case by case basis on request of a member;
- define and request a package after thorough study of the need, at the moment of submitting the first draft standard of this package to enquiry;
- propose a DOW, common to all CEN Members, being six months later than the target date for availability of the last item out of this package;
- inform in the foreword of these standards about the existence of this package and the DOW, by quoting the inter-related items;
- bear in mind that the extension of DOW, beyond the usual 6 months, should not go beyond 3 years later than the availability of the first standard of the package;
- bear in mind that CEN Members shall, in relation to packages, include a cautionary note in the national implementation of the EN, drawing attention to the “packaging” and the “DOW of national standards”, explaining what it means in the individual national cases.

**Summary: Propose the “package approach” for inter-related standards according to the CEN Guidance – Package of European Standards.**

#### 4.1.4 Is the standard numbering as simple as possible (and not multi-layered)?

Complicated standard numbers – e.g., EN 60684-3-100 to 105 – are not user friendly:

- Standard numbers with part and sheet numbers should be avoided;
- Part or sheet numbers xxx to yyy should be used only to avoid “mammoth-sized standards” which would otherwise be too long and require frequent amendments.

Summary: Keep numeric designations of standards as simple as possible (see also 4.1.2).

#### 4.1.5 Do standard designations exist for technical items and procedures?

There are many circumstances in which, instead of using a lengthy description of an item, it is convenient to have a brief designation by which the item may be identified uniquely, e.g., for a hexagon head screw with thread M12, nominal length 80mm, property class 8.8, according to ISO 4017: Hexagon head screw ISO 4017 – M12 x 80 – 8.8.

- Annex C of Principles and rules for the structure and drafting of CEN/CENELEC documents (ISO/IEC Directives – Part 2:2016), specifies that it is particularly useful if all tradeable items are provided with standard designations. The same principle should apply for standardized procedures, e.g., test methods;
- Standard designations shall always be illustrated by an example;
- All possible non-numerical characteristic should be given by concise, citable, uniform symbols or abbreviations respectively (see 4.1.6).

Summary: Use standard designations, see also 4.2.2, because it is a problem for users of such standard designations if they are not available.

#### 4.1.6 Have internationally identical abbreviations been used and explained?

Because standards users have typically to apply a variety of standards, they expect a consistent use of abbreviations. An explanation of the origin of abbreviations will help users of the standard to understand and remember them:

- Different abbreviations used in different languages, e.g., in tables of European Standards, should be avoided if possible and shall otherwise be explained;
- Standard designations shall use agreed upon identical abbreviations or their source language shall be specified;
- Abbreviations shall always be explained.

Summary: Use uniform abbreviations and provide explanations.

#### 4.1.7 Does the standard include the following information and, if applicable, list all important changes to the previous edition of the document (Foreword)?

For standards users, it is very important to get information about changes of standards and their relations:

- The appropriate text (supplied by the committee secretariat) shall give a statement of significant technical changes from any previous edition of the document;
- All international organizations involved in preparing the document should be mentioned;
- The Foreword should indicate whether the document replaces other documents completely or in part;
- The Foreword should indicate the relationship between this and any other documents.
- For adopted IEC standards, information shall be included about the next “maintenance result date” (see ISO/IEC directives, IEC-Supplement 2016, Clause 4).

Summary: Place the standard in the context of those involved in its preparation and in conjunction with any related documents, and give significant changes.

#### 4.1.8 Are all normative documents available?

The application of a standard usually requires further standards. The user of a new standard is disadvantaged if not all referenced standards are equally available (e.g., testing standards needed for a material standard):

- All documents which are necessary for implementing the standard shall be listed in the normative references and shall be available when the standard is published.
- Drafts should not be used as normative references as they are often not publicly available, and may change following comments stage.

Summary: Ensure that all normative documents are available.

## 4.2 Relevant national details concerning EN adoption

### 4.2.1 Does the national foreword give details of the most important differences between the new standard and the national standard(s) it is replacing?

For a standards user, it is of utmost importance to get information about how previous national standards and replacement European Standards differ to the greatest extent possible:

- The most important differences in scope, content and structure should be given in a logical and comprehensible way at an appropriate place in the national elements of the national reproduction of an EN. In the case of reproduction, a national title page is generally added;
- A national foreword and national annexes are permitted;
- In particular, omission of previously included national standard types, sizes, procedures or regulations shall be explained; and
- Where the content of a former national standard is distributed among several ENs or a complete field of standardization is restructured, the new philosophy, layout and structure should be illustrated.

Summary: Check for a “package approach” (see 4.1.3).

### 4.2.2 Have standard designations been used for technical items and procedures?

All tradeable technical items and procedures should have standard designations as explained in subclause 4.1.5. If that is not the case in a European Standard to be adopted as a national standard, then it should be provided in the elements of the national publication:

- If a standard designation is missing from a European Standard, it should be included with an example in the national foreword, in accordance with Annex C of CEN/CENELEC Internal Regulations Part 3 (see 4.1.5);
- All possible non-numerical characteristics should be given concise, citable, uniform symbols or abbreviations (see 4.1.6).

Summary: Check for standard designations.

## 4.3 Assistance in implementing standards

### 4.3.1 Are users informed well in advance about forthcoming new European Standards and the removal or revision of related national standards?

The implementation of new standards in an organization can seldom occur immediately. Depending on the complexity, it takes some time to prepare the transition, especially when a new European Standard is replacing a former national one:

- This information is especially important for operational planning such as participation and implementation on the users’ side. Therefore, when a new standards project is announced, every effort should be made to make it widely known, such as through the appropriate media.

Summary: Use every opportunity to provide detailed information.

### 4.3.2 Are contacts maintained with existing and potential users?

The composition of a committee is usually very limited, hence its members should look for a broader user feedback:

- Through relevant user associations such as IFAN and individual experts;
- Through relevant industry organizations and associations.

Summary: Involve useful contacts at an early stage.

### **4.3.3 Do the responsible national committees provide user support to facilitate the implementation of standards?**

Where there are far-reaching changes, it may not be sufficient just to give a listing of the main ones. It may also be necessary to explain to the users of the standard the reasons for the changes or even to offer them some form of training:

- by including explanations in the national foreword (see 4.2.1) or national annex;
- by listing the differences between the new standard and its predecessor in a supplement or the like; or
- by offering explanatory courses and providing information through workshops, information brochures, CD-ROMs or other relevant data media.

Summary: Support additional informative elements in standards and provide appropriate assistance for users.

### **4.3.4 Are standardized items/products complying with a new European Standard already commercially available?**

A “standardized item” may signify a physical item (such as a material or a manufactured product), or may mean an intangible item (such as a process or system, a test method, a collection of symbols, or requirements for marking and delivery). At the time of publication of a revised standard, newly introduced variants may not yet be available:

- If they are not yet available, when will they be?
- Is a transition period necessary?
- Operational changes, e.g., using new fasteners, can only succeed if components can be supplied.

Summary: Check the supply situation and allow a transition period if necessary.

### **4.3.5 Can testing already be carried out in accordance with new test standards?**

It is always important to determine whether the test methods proposed can be performed with existing equipment.

- If it is not possible, when will new or amended test methods and equipment be available? Is a transition period necessary?
- When new test standards or amended test procedures are introduced, this can cause operational problems if suppliers and customers cannot immediately carry out the new tests.

Summary: Include explanations in the national foreword, national annex or in supplements about the availability of the tests, and allow a transition period if necessary

## COMMITTEE CHECKLIST for SECTION 4

This is intended for committee members to copy and fill in as required

Clause	Topic to be checked	OK?
4.1	<b>Substance</b>	
4.1.1	Is the structure and wording of the European Standard understandable by all kinds of users?	
4.1.2	Are the extent/scope of the standard user-friendly?	
4.1.3	Does the field of standardization involve several inter-related standards?	
4.1.4	Is the standard numbering as simple as possible (and not multi-layered)?	
4.1.5	Do standard designations exist for technical items and procedures?	
4.1.6	Have internationally identical abbreviations been used and explained?	
4.1.7	Does the standard include the following information and, if applicable, list all important changes to the previous edition of the document (Foreword)?	
4.1.8	Are all normative documents available?	
4.2	<b>Relevant national details concerning EN adoption</b>	
4.2.1	Does the national foreword give details of the most important differences between the new standard and the national standard(s) it is replacing?	
4.2.2	Have standard designations been used for technical items and procedures?	
4.3	<b>Assistance in implementing standards</b>	
4.3.1	Are users informed well in advance about forthcoming new European Standards and the removal or revision of related national standards?	
4.3.2	Are contacts maintained with existing and potential users?	
4.3.3	Do the responsible national committees provide user support to facilitate the implementation of standards?	
4.3.4	Are standardized items/products complying with a new European Standard already commercially available?	
4.3.5	Can testing already be carried out in accordance with new test standards?	

# 5. General reference documents for standards work

Reference documents for those involved in European standards work and in preparing European Standards:

## CEN/CENELEC Internal Regulations

**Part 1** Organization and Structure, 2017 ([English](#), [French](#), [German](#))

**Part 2** Common Rules for Standardization Work, 2017 ([English](#), [French](#), [German](#))

**Part 3** Principles and Rules for the structure and drafting of CEN and CENELEC documents 017 ([English](#), [French](#), [German](#))

## CEN/CENELEC Guide 17 Guidance for writing standards taking into account micro, small and medium-sized enterprises (SMEs) needs.

Source: <http://www.cencenelec.eu/sme/smenews/Pages/guide17.aspx>

## ISO/IEC Directives supplement 2016

Source: [http://www.iec.ch/members\\_experts/refdocs/iec/isoiecdir-iecsp%7Bed10.0%7Den.pdf](http://www.iec.ch/members_experts/refdocs/iec/isoiecdir-iecsp%7Bed10.0%7Den.pdf)

**Vienna Agreement** Agreement on technical cooperation between ISO and CEN

Source: [http://boss.cen.eu/ref/Vienna\\_Agreement.pdf](http://boss.cen.eu/ref/Vienna_Agreement.pdf)

## Guidelines for the implementation of the Vienna Agreement

Source: [http://boss.cen.eu/ref/VA\\_Guidelines\\_implementation.pdf](http://boss.cen.eu/ref/VA_Guidelines_implementation.pdf)

## Frankfurt Agreement: CENELEC Guide 13: IEC - CENELEC Agreement on Common planning of new work and parallel voting

Source: [ftp://ftp.cencenelec.eu/CENELEC/Guides/CLC/13\\_CENELECGuide13.pdf](ftp://ftp.cencenelec.eu/CENELEC/Guides/CLC/13_CENELECGuide13.pdf)

**Directive 2015/1535** Of the European Parliament and of the Council laying down a procedure for the provision of information in the field of technical regulations and of rules on Information Society services (codification)

Source: <http://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32015L1535&from=EN>

## Joint Initiative on European Standardization

Source: [https://ec.europa.eu/growth/single-market/european-standards/policy\\_en](https://ec.europa.eu/growth/single-market/european-standards/policy_en)

## EN 45020

Standardization and related activities  
General vocabulary (ISO/IEC Guide 2, latest version)  
Trilingual version EN 45020, latest version

Source: European Standards are available as national versions from the relevant Standardization Organisations or from Standards Distributors

## ISO/IEC 17000

Conformity assessment -- Vocabulary and general principles

Source: Standardization Organisations or Standards Distributors

## **6. Feedback**

**User feedback on working with the checklist will be welcome.**

**Please email your feedback to the IFAN Secretariat**

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