



BUSINESS PLAN
ISO/TC 72
Textile machinery and accessoires

EXECUTIVE SUMMARY

To understand the market situation for the manufacturers of textile machinery it is necessary to provide some general information about the customers of the textile machinery manufacturers. Therefore, we describe thereafter the situation of the textile market.

Textiles are one of the most heavily traded commodities. The industry includes manufacturing of fibres, yarn, ropes, fabrics and industrial fabrics (e.g. canvas, netting). There is also extensive movement between countries as companies take steps to become more innovative and competitive. Yarns spun in one country, may be woven or knitted in another, cut to design in a third, and finished in the originating country. This particular development is driven by an increase in production sharing arrangements within the apparel segment of the industry in order to reduce costs.

As an example, EC textile companies look increasingly to Eastern Europe to help reduce domestic cost. The US in turn looks to Mexico and the Caribbean as its outward processors. The historical market leaders in the textile industry increasingly have to rely heavily on their technological development, their capital resource and their capacity to diversify, to retain market share.

However, it is now evident that developing countries like China, India, Pakistan, etc., where labour costs are less significant than those for high technology account for the largest portion of the worldwide output of yarns, fabrics, and apparels. As consequence textile machinery apply is also shifting rapidly towards these economies.

Notable exceptions are laundry and dry cleaning machinery, which are mostly used in developed countries. Developing countries such as China are only just beginning to building up their own dry cleaning and laundry machinery industry, which, as a first step, will predominately cater for their respective home market.

The name of the ISO/TC 72 has changed from "Textile machinery and machinery for dry cleaning and industrial laundering" to "Textile machinery and accessories", because "Laundry and dry cleaning machinery" can be considered as textile machines.

1 INTRODUCTION

1.1 ISO technical committees and business planning

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

1.2 International standardization and the role of ISO

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: [ISO](#) (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of [IEC](#) (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of [ITU](#) (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 140 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the [International Standard](#).

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its [Technical Committees](#) are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.

2 BUSINESS ENVIRONMENT OF THE ISO/TC

2.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

Market situation

The total size of the worldwide textile machinery and accessories market is approx. 20 - 22 billion US Dollars per year. Depending on the general economic situation the annual market growth is expected to be 1-2 %.

In addition the worldwide market for industrial laundry- and dry cleaning machines and accessories is approximately 5 billion US Dollars

Major factors, which may have an impact on the development of the market

In general it can be said that textile machinery are to a large extent designed in countries which are on a high industrial level, but may be produced and used in countries which are on a low salary level. This trend is expected to accelerate over the next few years. In addition, it can be said that as of late an increasing number of machines are not only manufactured and used, but also designed in low wage countries such as China and India.

With respect to dry cleaning- and industrial laundry machinery, developing countries with substantial economic growth are beginning to produce locally to cater for the vastly increasing home market.

Legal factors

For European countries there are some directives with regard to safety aspects, which have a direct impact on the standardisation work.

2.2 Quantitative Indicators of the Business Environment

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC:

The huge production of raw material to feed the regular consumption of the textile industry is indicated by the recent worldwide production figures for cotton, wool and man-made fibres.

Raw cotton	2003	21.3	Mio t
Raw wool	2003	1.2	Mio t
Synthetic fibre	2003	31.5	Mio t
Cellulosic fibre	2003	3.5	Mio t

The major suppliers of the raw materials to the industry are:

Cotton:	USA, China, India
Wool:	Europe, Australia, and China
Synthetics:	Europe, USA, China, Taiwan, Japan, Turkey and South Korea

With respect to industrial laundry- and dry cleaning machines it is estimated, that approximately 75 Tonnes of fabrics are washed or cleaned per year.

Reflecting the current market shift of textile machine manufacturing and textile machinery use and in accordance with the Vienna agreement dealing with standardisation work within ISO and CEN, it has been agreed by all parties involved to develop standards for textile machinery within ISO/TC 72 only. An important exemption being the development of C standards for safety and health

aspects (in accordance with the EU machine directive) for which joint standards under the lead of ISO are developed.

Parties interested in ISO/TC 72 are:

- All textile machine manufacturers world wide
- All textile manufacturers world wide
- Corresponding trade unions (in particular for safety standards)

3 BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC

Benefits

1. Reliability. Experts from countries worldwide, interested in the work of IS/TC 72, deliver the best knowledge and capability to assemble the best technical information and requirements in every aspect such as design, performance, installation, definition, test method etc. in order to assure reliability of the co-operate of the several components to complex plants to their customers.
2. Efficient worldwide trade. Development and/or maintenance of International Standards on textile machinery and accessories, permits the continuation of efficient worldwide trade.
3. Unique design. The use of standardized products allows unique design and production of equipment worldwide
4. Worldwide acceptance. Through these works ISO/TC 72 contributes to the business of textile machinery by promoting their wide acceptance in various applications, by saving expenses by avoiding the overlapping of technical solutions.
5. Temporally advantage. The actively participating experts in the work have a big knowledge advantage. They know what is going on and they can influence and transfers the interest of their employers directly into the development of the standards. On the other hand the companies have more time to adapt their products to the expected standards, which results in reduced cost over several years.
6. Fruitful impact to the experts. The personal contact between experts of different competitors, within the working groups may have a fruitful impact on development of new products by various machine manufacturers.

4 REPRESENTATION AND PARTICIPATION IN THE ISO/TC

4.1 *Countries/ISO members bodies that are P and O members of the ISO committee*

4.2 *Analysis of the participation*

In the past standards have been exclusively developed by European P-members.

The other P-members have mainly contributed by adding comments at different stages of the standard development. To improve the situation it is planed to schedule future ISO meetings in those countries

5 OBJECTIVES OF THE ISO/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

5.1 *Defined objectives of the ISO/TC*

Objective of ISO/TC 72

Based on the above considerations, ISO/TC 72 proposes the following objectives and strategic directions for its future work:

1. Elaboration and development of a coherent library of standards that fulfil the needs of identified users in the field for textile machinery on:
 - Spinning preparatory, spinning, twisting and winding machinery and accessories
 - Machinery for fabric manufacturing including preparatory machinery and accessories
 - Dyeing and finishing machinery and accessories
 - Industrial laundry and dry-cleaning machinery and accessories
 - Textile machinery parts in contact with processing oils, test methods and interactions
 - Data interfaces for monitoring and control of textile machinery
 - Safety requirements for textile machinery
 - Noise measurements methods and reduction of noise for textile machinery
 - Graphical symbols for textile machinery

2. To have a work programme that is relevant to the needs in first priority of the international market.

3. To establish a project-based approach to the development of standards throughout the TC/SC/WG and, thereby substantially reduce the period of development.

4. To ensure that ISO/TC 72 standards take account of established regional and international standards wherever possible in particular:
 - ISO standards;
 - IEC standards;
 - CEN Type "A" and "B" standards for machinery;
 - CENELEC standards.

ISO/TC 72/SC 8 and partially ISO/TC 72/SC 5 are developing standards in support of the Machinery Directive 98/37/EEC. These standard will be harmonised i.e. it will address the ESRs that are listed in Machinery Directive, by specifying requirements and/or measures for reducing or eliminating the risks associated with the hazards relevant to the product(s) covered by the standard. Each harmonised standards can be used by manufacturers/suppliers as an alternative to the Machinery Directive for claiming "presumption of conformity" with the relevant ESRs of the directive. All work related to safety and noise emission, is elaborated in closed co-operation with CEN/TC 214 "Textile machinery and accessoires" and under the lead of ISO/TC 72/SC 8 "Safety requirements for textile machinery" and ISO/TC 72/SC 5 "Industrial laundry and dry-cleaning machinery and accessories" in accordance with the Vienna Agreement.

5.2 Identified strategies to achieve the ISO/TC's defined objectives

Strategy to reach the objectives

The current work programme of ISO/TC 72 produces the family of standards, as defined in objectives of the ISO/TC 72.

In order to be able to react quickly and effectively to drafting international standards and answering queries, ISO/TC 72 does not write any standards itself; it has established seven sub committees with a total of 31 working groups. The WGs write standards covering the range of products within the scope of their WG title and/or allocation by the involved mother SC/TC. Each Sub Committee (SC) and Working Group (WG) has full responsibility for the technical and presentational content of the standards under its responsibility. The Chairman advisory group of ISO/TC 72 (TC Chairman and all TC/SC secretaries) meets regularly and acts in a management and co-ordinating capacity, only intervening in the work of its SCs and WGs when asked or if necessary to resolve a specific problem.

In addition to the task of drafting international standards, the task of the WG covers

- the task of resolving incoming comments at the different stages, e.g. 30.20 and 40.20;
- their own translations, where possible;
- the holding of Comments Resolution Meeting (to deal with the comments arising from Enquiry);
- the editing work, which is requested to be by correspondence, as far as possible.

Specific strategies and initiatives within ISO/TC 72 are:

- Setting of realistic target dates;
- Setting of categories of priority for the work programme;
- Permanent supervision of the progress of work through the TC secretariat;
- Supporting of the SCs through the TC Chairman and Secretary;
- Maintaining a close contact and relationship with ISO/CS and its staff members;
- To continue using a single language for meetings to obviate the problems and expense of organising interpreters/translation;
- To continue close liaison with the liaison members given in clause 7.1 Structure of the ISO committee
- To continue to make maximum use of the Vienna Agreement to develop standards for global use
- To maintain a close contact and relationship with regard to safety standards CEN/CMC; CEN/TC 214 and the CEN Consultants involved;
- To accept the defined work load of the key persons, as stipulated in this Business plan, coordination of the secretaries under the leadership of the Chairman where such an action appears appropriate;
- To actively contribute in solving of political or technical problems (networking);
- To cancel work items when it is clear that the industry expresses no need for it or is not prepared to provide sufficient experts to work on it;
- To hold plenary meetings, as often there is a justified need.

6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME

Risk analysis

ISO/TC 72 was created in 1949 and since then various weaknesses and obstacles, both internal and external, have hampered its progress. These can be summarised as follows:

1. Contribution of experts. Since the experts work in standardization on a voluntary level, the contribution from experts (e.g. from industry) is not always made available as expected. A further reason of loss of contribution is the long and complicated processes of standard development including other problems inflicted by, e.g. co-operation with the CEN system, see specific items below in this list.
2. Large number of comments at Enquiry (CD and/or DIS). With some work items there are many technical comments from countries that have not been involved with the drafting in the Working Group. This results in a lot of unexpected comments and corresponding extra work for the Comments Resolution Meeting (CRM). To illustrate one CRM took, including 3 preparation meetings, 12 days to clear the amount of more than 200 comments.
3. Lack of base standards. Some work items have not had the benefit of base standards for the subject (e.g. national standards, ISO standards). Consequently these work items have had to start from a blank sheet of paper. It takes a lot of time and effort to establish a list of subjects to be covered, in a logical order;
4. Balance of the working groups. It is recognised that not all the working groups have a perfect balance, e.g. manufacturers, users, and national safety bodies. New participants are welcomed.
5. Requirement of five actively participating members. Sometimes it is difficult to find the five actively participating members who are stipulated by the ISO Directives for acceptance of new work items. Especially for ISO/TC 72/SC 4 and SC 9 were only 7 members have the status of P-member.
6. Amount of IS and WI in the TC 72. The large existing library of 155 standards under the responsibility of ISO/TC 72 needs regular review/ confirmation/ amendment/ revision to meet the needs of industry. Together with a current programme of nearly 40 WIs in development, and an expected additional 10 new items within this year, is having the cumulative effect of keeping participating experts, and committee secretaries at full capacity. This overstretch may well create a number of competing priorities, displace essential planning and disrupt the planned progress of project development.

For work items under the Vienna agreement:

7. Other factors. There are other factors beyond direct control of the ISO/TC 72 or its sub-committees e.g. the turn around time for parallel processing in CEN and ISO can have an important impact on the progress. One of the measurements to reduce this impact is, that all work items of interest for CEN and ISO are under ISO lead. Furthermore identical Chairmen, convenors, and secretaries guarantee a close co-operation between CEN/TC 214 and ISO/TC 72.
8. Lateness of comments from the CEN Consultant for Machinery. The CEN Consultant is required to assess the draft and make comments/proposals during the Enquiry period and prior to Formal Vote. Due to pressure of work he sometimes misses the deadline and submits his report after the end-of-Enquiry and the Comments Resolution Meeting (CRM). In these cases the CRM is not forewarned of his comments and cannot deal with them in a timely manner.

7 STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC

This section gives an overview of the ISO/TC's structure, scopes of the ISO/TCs and any existing subcommittees and information on existing and planned standardization projects, publication of the ISO/TC and its subcommittees.

7.1 [Structure of the ISO committee](#)

7.2 [Current projects of the ISO technical committee and its subcommittees](#)

7.3 [Publications of the ISO technical committee and its subcommittees](#)

Reference information

[Glossary of terms and abbreviations used in ISO/TC Business Plans](#)

[General information on the principles of ISO's technical work](#)