

BUSINESS PLAN
CEN/TC 218
RUBBER AND PLASTIC HOSES AND HOSE ASSEMBLIES

EXECUTIVE SUMMARY

Business environment

- Rubber and plastics hoses and hose assemblies are used as flexible connections for the movement of materials such as air, water, oil, steam, powdered materials, foodstuffs, etc.
- The total world market for hose products is 2.3 billion Euro. Europe represents approximately 20% of the global market.
- Parties involved: All industries at national and international level where movement or use of materials is crucial in their work, as well as public authorities, laboratories and consumer representatives.

Benefits

To define and prepare European standards for rubber and plastics hoses and hose assemblies for all applications, including methods of test, taking account of work already carried out by ISO, European trade associations and national standard bodies (with the exception of fire-fighting hoses) whilst taking into account political, economical, social, technical, legal and international factors.

Priorities

- a) to elaborate standards on rubber and plastics hoses and hose assemblies (excluding fire-fighting hose, medical hoses, automotive hoses, hoses for diving equipment, welding hoses and other hoses for special applications, developed by other CEN/TCs);
- b) to develop standards for hose fittings and couplings for a number of hose types
- c) to adjust its work programme to meet market needs;
- d) to work in cooperation with committees in ISO, particularly ISO/TC 45/SC 1

1 BUSINESS ENVIRONMENT OF THE CEN/TC

1.1 Description of the Business Environment

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

CEN/TC 218 is responsible for the preparation of European standards for rubber and plastics hoses and hose assemblies for all applications, including methods of test, taking account of work already carried out by ISO, European trade associations and national standard bodies (with the exception of fire-fighting hoses).

- **Market situation**

Rubber and plastics hoses and hose assemblies are used as flexible connections for the movement of materials such as air, water, oil, steam, powdered materials, foodstuffs, etc., where it is not suitable to use a solid rigid pipe. They can be used for pressure or suction applications.

- **Stakeholders**

Include all industries at national and international level where movement or use of materials is crucial in their work, as well as public authorities, laboratories and consumer representatives, who are interested in having a set of standards and terminology which defines the test methods as well as the performance requirements of the final product. The members of the TC and working groups represent manufacturers, users, public authorities and national standards bodies.

- **Economic**

The European market comprises only 20% of the worldwide market for hose products, therefore it is crucial for the European Standards being produced to achieve recognition outside of Europe. To this end, CEN/TC 218 has adopted and plans to adopt a number of existing ISO standards, to become EN ISO documents; this is particularly true of its hose test method standards. CEN/TC 218 also has a number of standards which are being developed in parallel in CEN and ISO under the Vienna agreement. CEN/TC 218 has presented a number of its published standards for their consideration as adoptions in ISO.

- **Social and safety issues**

Such issues can best be addressed for hose products by producing standards which includes requirements for clear and uniform identification. This has been addressed by CEN/TC 218 by introducing a 'standard' marking clause into all of its specification standards.

- **Technical factors**

The specifications produced by CEN/TC 218 set performance requirements for the final product and therefore no suitable method of manufacture is precluded. This clears the way for technical improvements and process innovations.

- **Legal factors**

Patents can sometimes be a disadvantage in the elaboration of CEN/TC 218 standards, especially where they can exclude the clear identification of hose products.

Existing national regulations have necessitated the inclusion of A-deviations in standards produced by CEN/TC 218.

International trade and standardization aspects have been addressed above.

1.2 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 CEN /TC:

The European market is typified by fragmented national manufacturers and is not dominated by a single manufacturer. No manufacturer has more than 10% of the total market, although some manufacturers have a dominant position in their own country's market. This situation is slowly changing due to mergers and acquisitions, but will probably never produce a single dominant manufacturer or supplier.

Increasing competition from outside of the EU is causing manufacturers to consider owning their own distributors, thereby creating a closer link between manufacturers and the end-user. The total world market for hose products is 2.3 billion Euro. This total can be split up by region and into industrial vs. hydraulic products as given in Table 1.

Market size/millions of Euro		
Region	Industrial	Hydraulic
Europe	190	300
USA	190	380
Rest of world	520	620
Total	900	1 300

Table 1 — Market for hose products

Approximately 20% of the global market is in Europe.

2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

CEN/TC 218 committee's standards:

- respond to or are expected to respond to recent changes and major innovations in the field;
- are addressed by the scope of the CEN committee;
- led to or are expected to support cost savings through implementation of them;
- removed or are expected to remove technical barriers to trade and open markets throughout Europe;
- support or are expected to support other European Standards;

- all CEN/TC 218 Standards are drafted in accordance with ISO/TC 45/SC 1 Guide 976 (latest edition Rev 7, 2013): Rubber and Plastics hoses and hose assemblies – Guidance on Layout of ISO and CEN standards. This does not apply to CEN/TC 218 EN standards for hose couplings and fittings.

3 PARTICIPATION IN THE CEN/TC

All the CEN national members are entitled to nominate delegates to CEN Technical Committees and experts to Working Groups, ensuring a balance of all interested parties. Participation as observers of recognized European or international organizations is also possible under certain conditions. To participate in the activities of this CEN/TC, please contact the national standards organization in your country.

4 OBJECTIVES OF THE CEN/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

4.1 Defined objectives of the CEN/TC

The objectives of CEN/TC 218 are:

- a) to elaborate standards on rubber and plastics hoses and hose assemblies (excluding fire-fighting hose, medical hoses, automotive hoses, hoses for diving equipment, welding hoses and other hoses for special applications, developed by other CEN/TCs);
- b) to develop standards for hose fittings and couplings for a number of hose types;
- c) to adjust its work programme to meet market needs;
- d) to work in cooperation with committees in ISO, particularly ISO/TC 45/SC 1.

The above objectives will:

- a) contribute to eliminate trade barriers;
- b) give standards international recognition, thus serving the global market;
- c) harmonize the terms of reference and terminology, thus increasing the understanding between parties;
- d) give direction to manufacturers on how to meet their legal and social responsibilities in relation to health and safety and to environmental issues (see 4.3).

4.2 Identified strategies to achieve the CEN/TC.s defined objectives.

4.2.1 General

CEN/TC 218 began its standardization programme by producing standards for those test methods to which it was foreseen reference would need to be made in its 'core' specifications. Further test methods will be prepared by implementation of ISO standards. Specification standards addressing a range of applications have already been published. Additional specifications are currently being elaborated.

4.2.2 International source documents

Existing standards are taken into account before commencing any new work. The adoption of ISO standards by the Unique Acceptance Procedure has in the past been applied to over 30 CEN/TC 218 standards which are being maintained.

Should any new work items be considered necessary where no reference documents are available, a new work item will be delegated to and developed by the relevant CEN/TC 218 working Group", which are currently:

- WG 1 Industrial, chemical and petrochemical applications
- WG 2 Hydraulic applications
- WG 4 Basic specifications and test methods
- WG 5 Couplings and hose fittings.

Where no relevant working group exists a new one will be created (e.g. Working Group 5 on hose couplings initiated in 2005).

4.2.3 International liaison

CEN/TC 218 has formally established a liaison with its equivalent ISO committee, ISO/TC 45/SC 1 Rubber and plastics hose and hose assemblies, and has appointed a liaison officer for this role. The principal function of this liaison is to avoid duplication of effort in the two committees. Liaisons have also been established with several committees.

4.2.4 Project management

The responsibility for individual projects is assigned to a specific project leader who is also a member of a relevant Working Group, who is nominated at the time of approval of the work item in order to achieve a timely and efficient delivery of standards.

CEN/TC 218 has formerly agreed to conduct its meetings in the English language only. Meetings of the TC are presently held every nine to twelve months and to save time and expense, working groups with enough business to conduct meet in the same location on the days prior to the TC main plenary meeting.

Outside of these meetings, WGs having sufficient business do meet at various locations in order to progress the standardization process. Where insufficient business is available to warrant a meeting, work items are progressed by correspondence.

4.3 Environmental aspects

Applications using hose products are potentially dangerous, and they can affect the health and safety of the user, as well as having an impact on the environment. All of these possible consequences have to be taken into account when producing the standards.

The objectives of CEN/TC 218 as stated under 4.1 give direction to manufacturers on how to meet their social responsibilities in relation to health and safety and to environmental issues.

CEN/TC 218 Business Plan

Date: 2014-11-27

Last review date: 2018-05-17

Page: 6

To assist the TC in addressing the environmental issues, a representative of the CEN Environmental Help Desk (EHD) gave a presentation at the 25th Plenary Meeting of CEN/TC 218 in 2012.

A summary of sources of information on CEN environmental aspects of standardization was circulated to the TC as an Annex to the report of the 24th meeting.

In addition to CEN Guide 4, where necessary the TC and its working groups can refer to ISO 17422:2002 *Plastics – Environmental aspects – General guidelines for their inclusion in standards* and ISO/TR 24699:2009 *Rubber and rubber products – Environmental aspects – General guidelines for their inclusion in standards* for more specific information.

During the creation of new work items using the online project creation tool, the TC Secretariat consults the WG Convenor about relevant environmental aspects specific to that work item.

In general, TC working groups use the CEN Environmental Checklist.

The environmental checklist as given in CEN Guide 4 should be included in drafts as an informative annex.

5 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE CEN/TC WORK PROGRAMME

5.1 Risk analysis

CEN/TC 218's partial reliance on the adoption of standards published by ISO has in the past led to two principal sources of delay to items in its own work programme:

- work items which have been delayed in ISO are not available for submission to the UAP process until they are published in ISO. These delays inevitably affect the publication of the CEN standard;
- The ISO subcommittee whose standards have been adopted by CEN/TC 218 or with which CEN/TC 218 has developed in parallel publishes its standards in English only; delays have been encountered awaiting translations prior to the formal progressions.