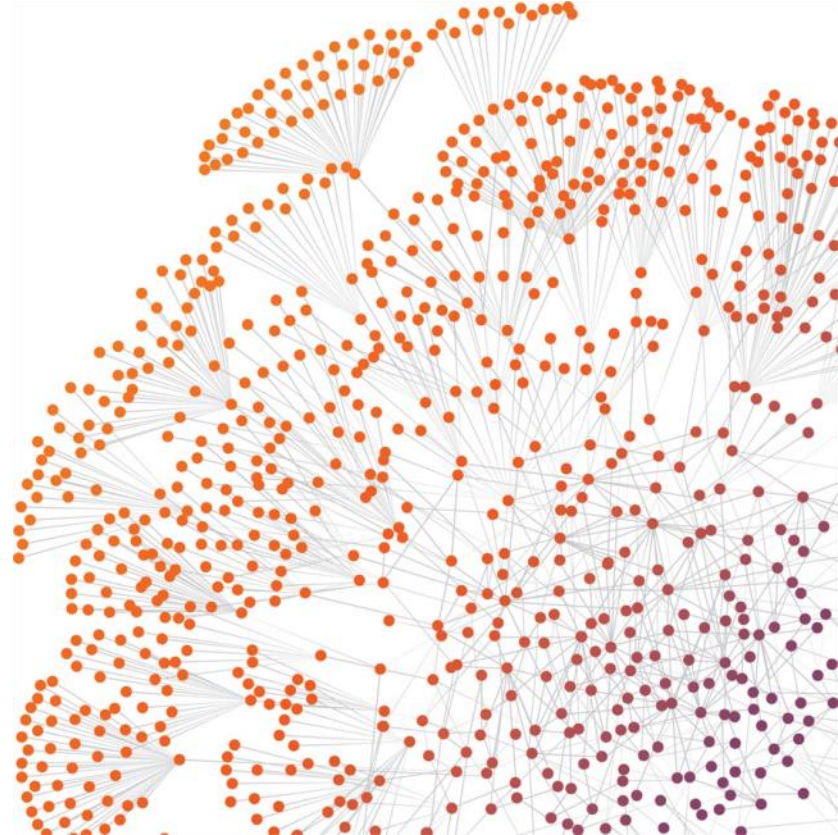# ISO 20252: 2019
Launch Event

Debrah Harding,

Chair, MRQSAB & BSI Committee SVS/3

April 2019

Agenda for today

- Summary of the changes - Debrah Harding, MRS, SVS/3 and MRQSAB

- Practical implications of the changes – Alison Gallagher, Kantar, SVS/3 and MRQSAB

- An update from IQCS on its plans in response to the changes to ISO 20252 – Penny Steele, Steele Fieldworks, SVS/3, MRQSAB and Chair of IQCS

- Transitional arrangements between the 2012 and 2019 standard – Debrah Harding

- How to obtain a copy of the new standard – Piera Johnson, Lead Programme Manager, Services, BSI

- Questions from the floor

- Wine and nibbles ISO 20252: 2019 launch reception sponsored by BSI

**Reason for and benefits
of the update**

- Incorporate changes in research processes since last update in 2012

- Reflect new data practices including ethical requirements

- Include standards developed since 2012 such as ISO 19731 the research data analytics standard

- Remove duplication

- One standard to cover all aspects of market, opinion and social research rather than different standards for different topics

Summary of the changes:
Other standards

- All mandatory requirements from ISO 26362 and ISO 19731 have been incorporated into the revised ISO 20252 standard

- The ISO standard for research access panels (online and offline), ISO 26362:2009, will be withdrawn

- The new data analytics research standard, ISO 19731, remains a separate standard

- New title: *Market, opinion and social research, including insights and data analytics – Vocabulary and service requirements*

- Expanded scope: *establishes terms, definitions and service requirements for service providers conducting market, opinion and social research, including insights and data analytics*

Aim of the changes

- The new standard sets out the guidance and requirements in which research projects are planned, commission, executed, supervised and reported to clients and provides a framework for:

  - ➢ clients to receive guidance regarding what to ask for
  - ➢ research providers to know what is expected from them
  - ➢ countries that do not have national standards
  - ➢ improving research quality and the profession
  - ➢ strengthening the research supply-chain via the sub-contracting provisions
  - ➢ emphasizing the importance and value of research, insight and data in business and society

Summary of the changes: Structure

- The ISO 20252 standard has been significantly restructured

- New Structure – mandatory 'core' sections:
    - Section 1: Scope
    - Section 2: Normative references
    - Section 3: Terms and definitions
    - Section 4: Core requirements for market, opinion and social research
    - Annexes

- All certified organisations must certify to core requirements (Section 1-4) plus at least one Annex

Summary of the changes:
Section 4 Core Requirements

New Structure – Section 4: Core requirements

- Statement of Applicability
- Confidentiality of research
- Documentation and records management
- Personnel and infrastructure responsibilities
- Personnel and organisation responsibilities
- Personnel performance management
- Information security
- Subcontracting services

New Structure – Section 4: Core requirements

- Planning, delivery and reporting on projects and research work
- Client relationship management
- Project work request or other responses to offer services
- Delivering outcome to the client
- Management review and improvement
- Internal audits

**Summary of the changes:
Structure and Annexes**

- New Structure – Annexes for different methodologies

- Annexes are optional dependent on business activities

- Statement of Applicability (SoA) will be required describing the complete scope of services provided and attested to the ISO 20252 standard

- SoA will be a clear statement of what is included and excluded from the scope of certification to the ISO 20252 standard i.e. which Annexes apply

Summary of the changes: Annexes

- The Annexes are:

  - ➤ Annex A: Sampling including access panels
  - ➤ Annex B: Fieldwork
  - ➤ Annex C: Physical observation
  - ➤ Annex D: Digital observation
  - ➤ Annex E: Self-completion
 - ➤ Annex F: Data management and processing

Comparison of 2012 and new version – a summary

ISO 20252: 2012 (OLD)	ISO 20252 (NEW)
Foreword, Introduction, Scope, Normative References & Terms and Definitions	Same order as before with updated text
Research Core System Requirements, Data Security, Back-up, Retention, Project Management and Client Reporting (Sections 3, 4 and 7 plus 6.8 and 6.9)	Section 4 Core Requirements with updated text
Data Collection (Section 5)	Annex A, B, C, D and E updated text and with ISO 26362 and ISO 19731 mandatory requirements incorporated
Data management and processing (Section 6 except 6.8 and 6.9)	Now Annex F with some updating to the text

A supplier view

**Alison Gallagher
Head of Global Compliance
Kantar**
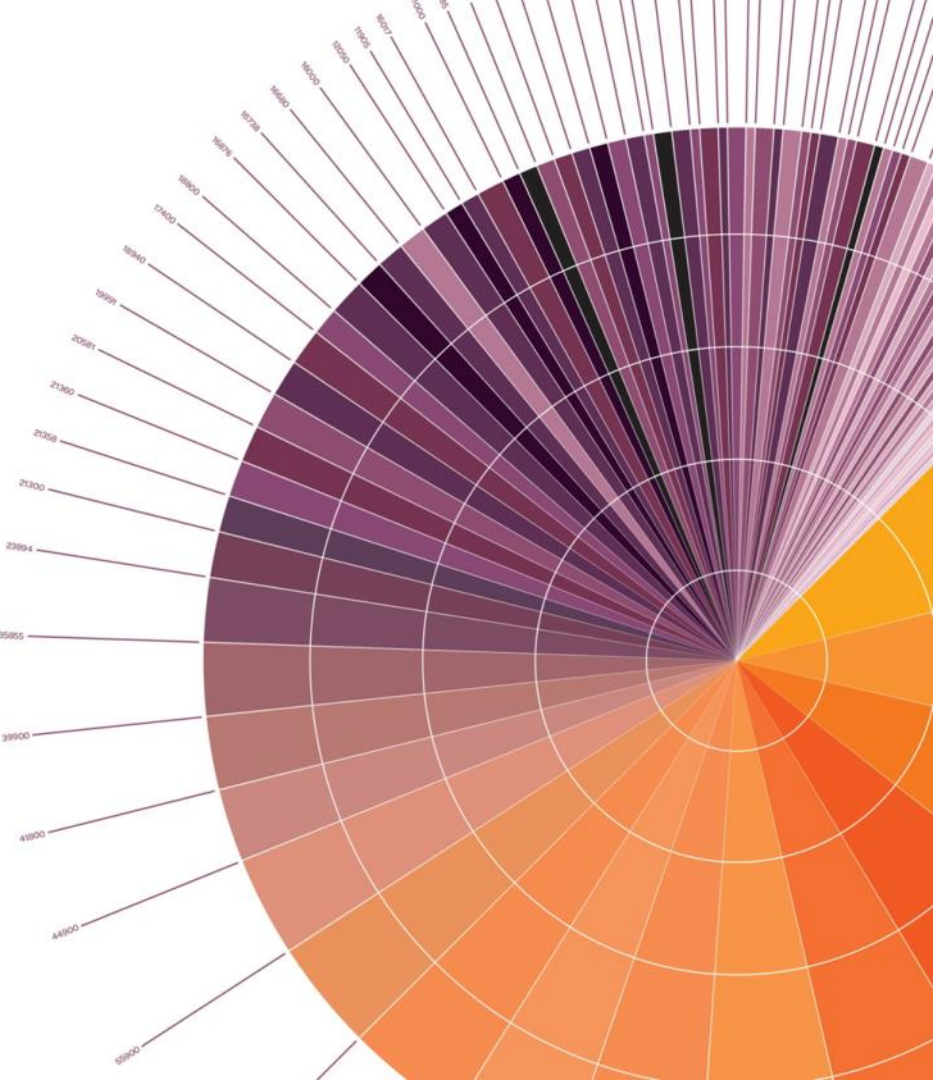
Implications of the new structure

Facilitates a modular approach to implementation	Helpful in assigning responsibilities e.g. for an Annex
Consolidated content removes repetition of requirements	Focus only needs to be on a specific Annex and core requirements

Statement of Applicability

New approach but similar to ISO 27001 which is helpful to businesses familiar with this standard	Requires careful review of scope to ensure it is accurate and not misleading
Helps to ensure that businesses do not make false/misleading claims	Could be detailed in a large/complex business

Example SoA

AG Research Ltd is a market, opinion and social research organisation offering research insights and solutions.

AG Research delivers research services to commercial and social organisations throughout the UK.

AG Research has elected to include Research teams 1-4, Sampling, Face to face fieldwork, Coding and Data processing to be attested to ISO20252:2019 in accordance with Annexes A, B, E and F. AG Research has elected to exclude Annex B and C from attestation. Details of AG Research attested annexes are described as follows:

Annex	Attested	Excluded	Explanation
Annex A – Sampling including access panels	Sampling team	Access panels (outsourced)	Panel partners not certified
Annex B – Fieldwork	Face to face fieldwork (outsourced)	Telephone fieldwork	Telephone – none conducted
Annex C – Physical observation	None	All	None conducted
Annex D – Digital observation	None	All	None conducted
Annex E – Self completion	Research teams 1-4	None	NA
Annex F – Data management and processing	Coding Data Processing (outsourced)	None	NA

Authorised by: Alison Gallagher, Managing Director   Date: 01 March 2019

Implications of the changes to content

| Change	Impact
Inclusion of mandatory requirements of ISO 19731 and ISO 26362	Consolidated documents = less to purchase and facilitates implementation
Updated/neutral terminology and inclusion of new data techniques	More 'future-proof' and increasing relevance for both businesses and clients
Rewording and restructuring of content	Less repetition = less likely for requirements to be missed/misinterpreted
Consolidated new information handling section	Additional processes may be required – less so if ISO 27001 certified. All requirements are now in one place
Extended management review requirements	More holistic approach and aligned with ISO 9001
Removed requirement for a Quality Manager	More flexible for the business
Weakened requirement for ISO 20252 statement in deliverables	Can be used where appropriate

Be prepared

Implementation will require detailed gap analysis to ensure nothing is missed and there is clarity around the amendments and SoA

Significant effort will be required for this!

IQCS' Perspective

Penny Steele
Chair of IQCS
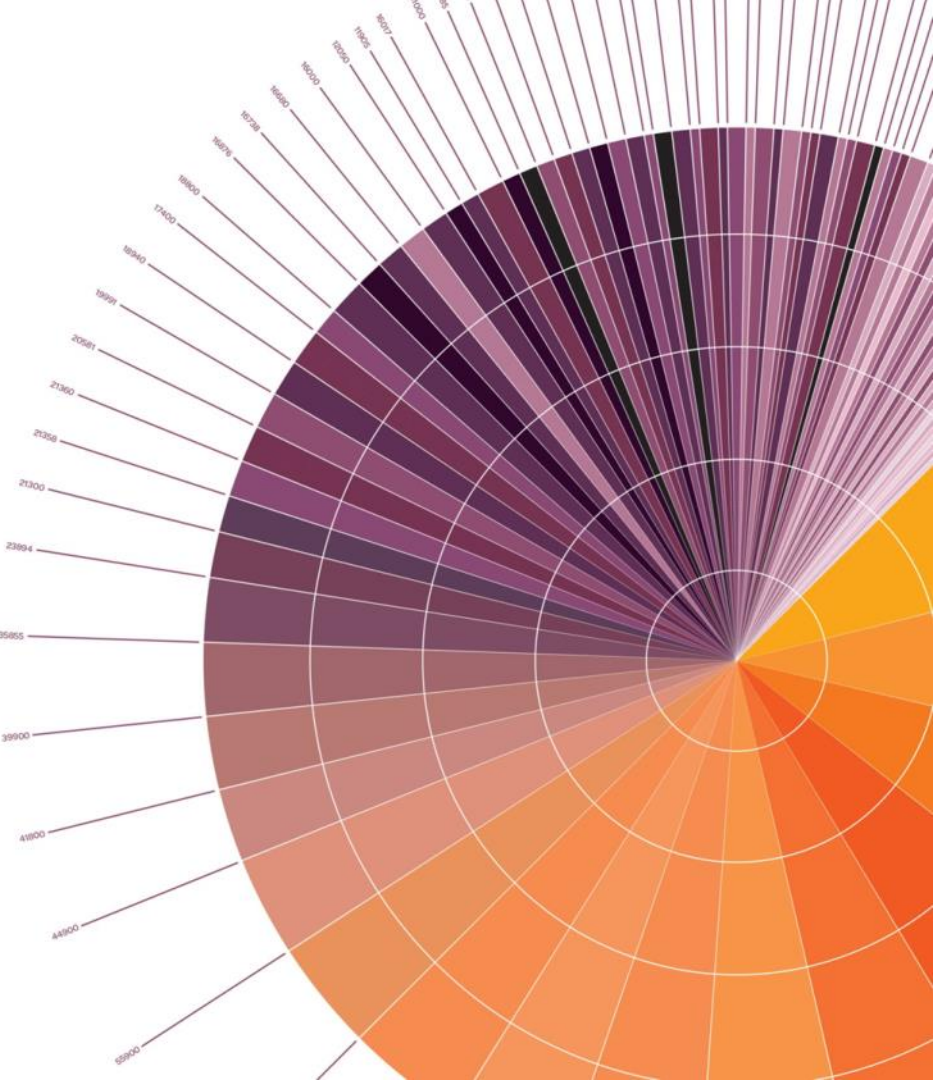
How the IQCS will respond

The Interviewer Quality Control Scheme currently has 12 ISO Company members and 13 IQCS Inspected Companies

IQCS standards are only relevant to Data Collection that is Interviewer administered

Many IQCS accredited companies are commissioned by ISO companies to conduct data collection on their behalf so it is vital that IQCS incorporates any new standards

In line with IQCS' previous update in 2013 IQCS will review the new ISO 20252 standard and add in, where relevant, any new mandatory standards

Timings

The IQCS accreditation process for 2019 will not change and companies will be inspected against the current 2013 version

The IQCS Standards Committee will convene in early summer to review and cross-reference both standards

Any additions will be discussed by the IQCS Council, flagged at the IQCS AGM in November and new standards will be issued by the end of 2019 highlighting any changes

IQCS Inspections in 2020 will be to the new amended IQCS Standards giving companies a minimum of 6 months to incorporate these changes into their quality control procedures

Transitional Arrangements

Debrah Harding
Chair of SVS/3 and MRQSAB
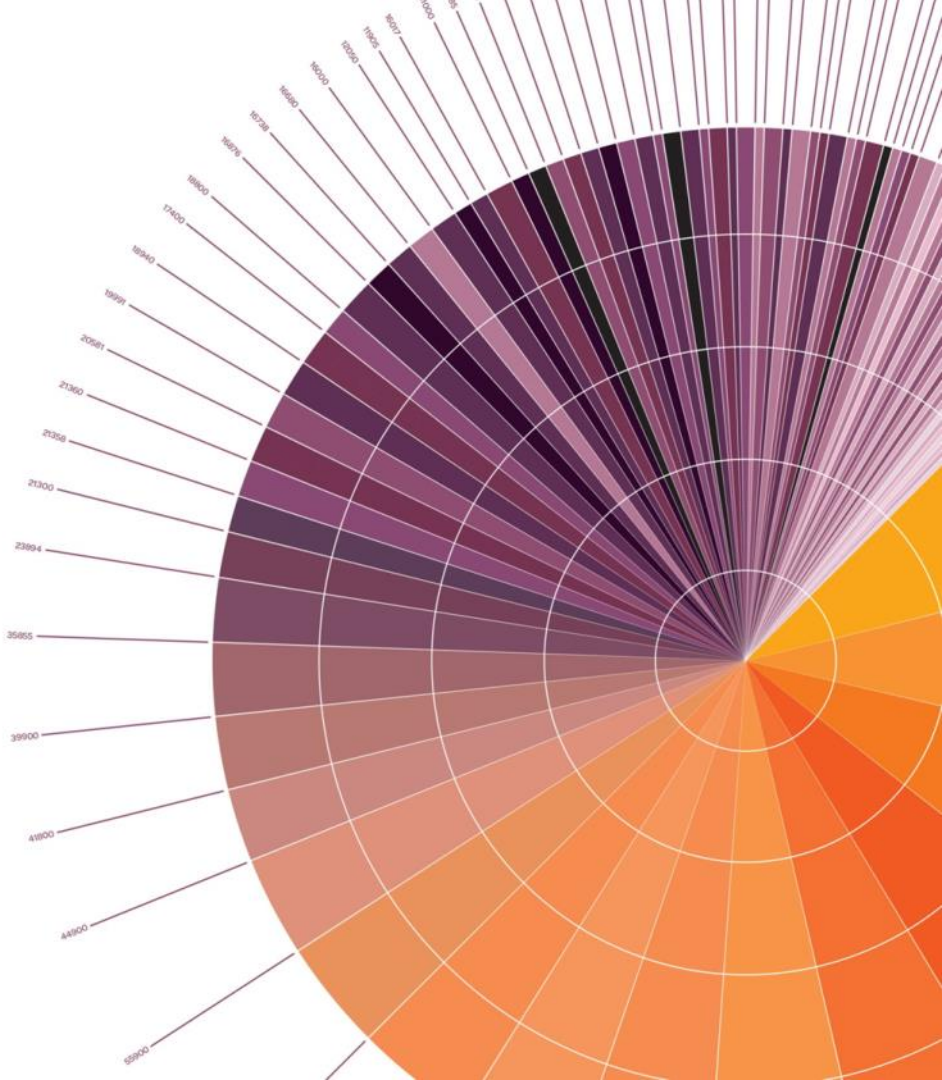
Transitional arrangements

- Chair of MRQSAB and SVS/3 liaised with the UK certification companies to agree the UK's transitional arrangements from the old to the new standard

- All current ISO 20252:2012 certified companies will have three years, from the launch of the new standard, in which to transition from the 2012 to the 2019 standard

- New standard launched on 11th February 2019

- Organisations must have switched to new standard no later than 10th February 2022

BS ISO 20252
Market, opinion and social research

The standard

BS ISO 20252: 2019

MRS Evidence Matters™

BS ISO 20252:2019

BSI Standards Publication

Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements

Available on the BSI Shop

BS ISO 20252

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