

The ISO Survey of Management System Standard Certifications – 2011

Executive summary

ISO has just released the results of its 2011 survey of accredited certification to ISO management system standards.

The results are available for the first time for free download from the ISO Website. You can also receive a CD of the data for your own analysis, for the cost of postage.

A summary of the statistics is shown in the table below.

Name of standard	Number of certificates in 2011	Number of certificates in 2010	Evolution	Evolution in %
ISO 9001	1 111 698	1 118 510	-6 812	-1%
ISO 14001	267 457	251 548	15 909	6%
ISO 50001	461	0		
ISO/IEC 27001	17 509	15 626	1 883	12%
ISO 22000	19 980	18 580	1 400	8%
ISO/TS 16949	47 512	43 946	3 566	8%
ISO 13485	20 034	18 834	1 200	6%
TOTAL	1 484 651	1 467 044	17 607	1%

ISO Secretary-General, Rob Steele, comments: "The results show significant increases in certification to ISO management system standards for information security, environmental management, energy management, and the sector-specific areas of food safety, medical devices and automotive.

"Certification to ISO 9001 for quality management decreased slightly by 1 %. Experts put this down to the revision of the standards that will begin shortly, for planned publication in 2015, and also to continual improvement in verification of the survey data received from multiple sources."

Rob Steele continues: "The survey is a pointer to the evolving global economy and of certification. A number of markets where certification took off in the early 1990s are showing signs of having reached maturity. For example, overall, this is the case of ISO 9001 certification in Europe, but the effect is not evenly spread for Italy is the country that experienced the highest growth in certificates. The East Asia and Pacific region has almost overtaken Europe for the regional share of ISO 9001 certificates.

"Overall, the importance of China as the workshop of the world and as the key link in many global supply chains is underlined. For the total number of certificates and for the growth in certificates from 2010 to 2011, China is in the top 10 countries for six out of the seven standards covered by the survey.

"Another trend seems to be the strong demand for certification to ISO standards in lower cost labour markets to reinforce their quality and efficiency in the market-place. Their growing competitiveness is reflected, for example, in Romania, which is in the top three countries for growth of ISO 9001, ISO/IEC 27001 and ISO 22000 certificates. It was also in the top three for the highest number of certificates to the new ISO 50001."

Here is a summary of the principal results:

ISO 9001:2008

ISO 9001:2008 gives the requirements for quality management systems. Certification to the standard is used in global supply chains to provide assurance about suppliers' ability to satisfy quality requirements and to enhance customer satisfaction in supplier-customer relationships.

Up to the end of December 2011, at least 1 111 698 certificates had been issued in 180 countries and economies, two more than in the previous year. The 2011 total represents a decrease of 1 % (-6812) over 2010.

The top three countries for the total number of certificates issued were China, Italy and Japan, while the top three for growth in the number of certificates in 2011 were Italy, China and Romania.

ISO 14001:2004

ISO 14001:2004, which gives the requirements for environmental management systems, retains its global relevance for organizations wishing to operate in an environmentally sustainable manner.

Up to the end of December 2011, at least 267 457 ISO 14001:2004 certificates had been issued, a growth of 6 % (+15 909), in 158 countries, two more than in the previous year.

The top three countries for the total number of certificates were China, Japan and Italy, while the top three for growth in the number of certificates in 2011 were China, Italy and France.

ISO/TS 16949:2009

ISO/TS 16949:2009 gives the requirements for the application of ISO 9001:2008 by suppliers in the automotive sector. Up to the end of December 2011, at least 47 512 ISO/TS 16949:2009 certificates, a growth of 8 % (+3 566), had been issued in 86 countries and economies, two more than in the previous year.

The top three countries for the total number of certificates were China, the Republic of Korea and the USA, while the top three for growth in the number of certificates in 2011 were China, India and the Republic of Korea.

ISO 13485:2003

ISO 13485:2003 gives quality management requirements for the medical device sector for regulatory purposes. Up to the end of December 2011, at least 20 034 ISO 13485:2003 certificates, growth of 6 % (+1 200) had been issued in 95 countries and economies, two more than in the previous year.

The top three countries for the total number of certificates were the USA, Germany and the United Kingdom, while the top three for growth in the number of certificates in 2011 were the USA, Israel and Japan.

ISO/IEC 27001:2005

ISO/IEC 27001:2005 gives the requirements for information security management systems. At the end of December 2011, at least 17 509 ISO/IEC 27001:2005 certificates, a growth of 12 % (1 883) had been issued in 100 countries and economies, eight less than in the previous year.

The top three countries for the total number of certificates were Japan, India and the United Kingdom, while the top three for growth in the number of certificates in 2011 were Japan, Romania and China.

ISO 22000:2005

ISO 22000:2005 gives the requirements for food safety management systems. Up to the end of December 2011, at least 19 980 ISO 22000:2005 certificates, a growth of 8 % (1 400) had been issued in 140 countries and economies, two more than in the previous year.

The top three countries for the total number of certificates were China, Greece and Romania, while the top three for growth in the number of certificates in 2011 were China, Italy and Romania.

ISO 50001:2011

ISO 50001:2011 gives the requirements for energy management systems. It was published in mid-June 2011. Up to the end of December 2011, at least 461 ISO 50001:2011 certificates has been issued in 32 countries and

economies. The top three countries for the total number of certificates were Spain, Romania and Sweden.

ISO and *The ISO Survey*

ISO and international standardization

ISO is the International Organization for Standardization. It has a membership of 164* national standards bodies from countries large and small, industrialized, developing and in transition, in all regions of the world. ISO's portfolio of more than 19 400* standards provides business, government and society with practical tools for all three dimensions of sustainable development: economic, environmental and societal.

* As of October 2012.

Of these, ISO 9001 and ISO 14001, which give the requirements for, respectively, quality management and environmental management systems, are among ISO's most well-known and widely implemented standards ever. They are used worldwide by businesses and organizations large and small, in public and private sectors, by manufacturers and service providers, in all sectors of activity.

Many users decide to have their management systems independently audited and certified as conforming to the standards. Certification is not a requirement of the standards themselves, which can be implemented without certification for the benefits that they help user organizations to achieve for themselves and for their customers. Nevertheless, many thousands of organizations have chosen certification because of the perception that an independent confirmation of conformity adds value.

ISO itself does not perform certification to its standards, does not issue certificates and does not control certification performed independently of ISO by other organizations. However, it frequently receives requests for information on the number of certificates and this led the organization to undertake *The ISO Survey*, which is now in its 18th year. ISO provides the basic results free-of-charge as a public information service on its Web site: www.iso.org

The collection and compilation of data for the 2011 survey was outsourced for the eighth consecutive year to the market research firm The Nielsen Company, Austria. The data was then analysed by ISO Central Secretariat.

Standards covered in this edition

This edition of the survey gives the worldwide panorama of certification to ISO management system standards at the end of 2011. The standards covered are:

- ISO 9001:2008 for quality management systems.
- ISO 14001:2004 for environmental management systems
- ISO/TS 16949:2009, gives quality management system requirements for the automotive sector
- ISO 13485:2003, gives quality management system requirement for medical devices
- ISO/IEC 27001:2005 for information security management systems
- ISO 22000:2005 for food safety management systems
- ISO 50001:2011 for energy management systems

About The Nielsen Company

The Nielsen Company is the leading global provider of marketing research information services, analytical systems and tools, and professional client services that help clients win in the market-place. The clients of Nielsen include the world's leading manufacturers and retailers of consumer packaged goods, as well as companies that market many other types of consumer products and services. Clients work with Nielsen to measure their market performance, to analyse market dynamics, to diagnose and solve marketing and sales problems, and to identify and capture growth opportunities. Nielsen's operations span more than 100 countries. Founded in 1923 by Arthur Charles Nielsen, Sr., Nielsen in the USA, the Austrian office was opened in 1961, initially carrying retail measurement. In 1990, consumer research was added to the range of services offered by the Austrian office.

How *The ISO Survey* is carried out

The ISO Survey has been carried out 20 times since the first in January 1993 (a second survey was carried out the same year). The survey is now published on an annual basis by ISO Central Secretariat (ISO/CS). For this 2011 edition, the principal sources of the data are certification bodies. ISO/CS would like to thank all sources for their participation and assistance.

Only certification bodies accredited by national members of the International Accreditation Forum (IAF – www.iaf.nu) have been used as sources*. The IAF is an international association that represents the national accreditation bodies set up in many countries to verify the competence of certification bodies. Therefore, the survey does not cover certificates issued by certification bodies accredited by organizations other than members of the IAF, or not accredited at all.

Many of the certification bodies which contribute data are business competitors of each other. For this reason, the data supplied is treated by ISO/CS as confidential in not being linked in the published survey to the certification body which supplied it. This rule is applied in order to avoid the data being used by competitors as business intelligence about their rivals. ISO/CS will not therefore comply with requests such as to identify the market share of certification bodies, or “the top 10 certification bodies in the world”.

As pointed out above, the survey is carried out once a year and ISO/CS does not maintain a database or running total which would allow it to meet requests for updates between publications of the survey.

It should be noted too that the data supplied is of the numbers of certificates – the individual organizations which hold certificates are not identified. Therefore, ISO/CS cannot satisfy requests for lists of certified organizations in a particular country or business sector.

The survey is of the numbers of certificates, not the numbers of sites covered by any one certificate. Although ISO/CS requests the suppliers of data to distinguish between single-site and multiple-site certificates, and includes this information when available in specific tables, not all suppliers provide such information.

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* The exception is Russian certificates which were accredited locally not by a member of the IAF,

Background to The ISO Survey - 2011

1993 to 2011 figures

The survey is produced in Excel files covering 1993 to 2011, which allows comparisons since the survey was launched. (Two surveys were carried out in 1993, but the figures given here are from the second of these.)

Continual improvement

In line with the ISO 9001 requirement for continual improvement, there is an on-going effort, launched in 2007, to improve the reliability of the data by harmonizing the collection methodology.

In previous years, the survey data had been collected from a variety of sources including ISO national member institutes, accreditation bodies, certification bodies and regional certification databases. A disadvantage of this approach was the resulting mixture of data from primary sources with secondary sources. Compiling data from secondary sources increased the possibility for error, particularly as these sources themselves may use different methodologies for compiling data.

To reduce such problems to the minimum, the data collection method has been undergoing harmonization since the 2007 survey so that whenever possible, it has been obtained from the primary sources – the certification bodies that actually issue certificates. In 2011, a review of the list of accredited certification bodies used for the survey has been a further improvement. Though it reduced the overall number of certification bodies surveyed in 2011, it increased the reliability of the overall figures.

These improvement efforts can sometimes result in lower country totals. For example, since the 2010 survey, certificates reported by a number of certification bodies have been deleted if even after several requests, they were unable or unwilling to confirm that the certificates were IAF accredited.

Certified sites

As pointed out in "How *The ISO Survey* is carried out", the survey is of certificates, not the number of sites covered by a certificate. At the same time, it is recognized that many organizations are choosing to have a single certificate covering multiple sites. Although not all certification bodies respond to the request to distinguish between single-site and multiple-site certificates, the response has been improving.

As a result, this edition of the survey innovates by including a number of tables (when sufficient data has been received) giving country-by-country breakdowns of the number of certified sites (single-site and multiple-site certificates cumulated).

Withdrawn certificates

In this survey, the figures for withdrawn certificates appear to have increased significantly, but should be treated as a rough indicator because not all sources respond to the request for such figures. The 2011 total may therefore indicate a better response than in previous years, rather than an increase.

Certification

Both the ISO 9000 and ISO 14000 families include a single standard – respectively, ISO 9001:2008 and ISO 14001:2004 – that gives the requirements for a management system and against which the system can be “certified”. This means that the system has been audited against the requirements of the standard by a specialized “certification” or “registration” body which, if the requirements have been met, issues a certificate of conformity, known as an ISO 9001:2008 or ISO 14001:2004 certificate.

Certification is not a requirement of any of the standards in the ISO 9000 or ISO 14000 families, including ISO 9001:2008 and ISO 14001:2004. Certification is not a requirement either of the other ISO management system standards highlighted in this survey – ISO/TS 16949:2009, ISO 13485:2003, ISO/IEC 27001:2005, ISO 22000:2005 and ISO 50001:2011.