

EA IC Train the Trainer Session ISO/IEC 17020:2026

1-2 JULY 2026
ONLINE

JASMIN GUNDLACH (DAKKS)
PETER STANS (RVA)
+
MAREK WILGOS (PCA)
FREDERIQUE LAUDINET (EA)

1-2 July 2026



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Aim of the training

- Preparation of ABs for using ISO/IEC 17020:2026
- Harmonize understanding of changes
- Collection of aspects to be further discussed in EA IC
- Focus on questions arising from the revision of the standard (not focus on “old” questions we already had on ISO/IEC 17020:2012)

Procedure for the training

- Agenda

Day1: Wednesday, 1 July 2026, online

Time	Subject
09.00 - 09.30	Welcome and Introduction Objectives of training Presentation of trainers / participants Agenda and working rules
09.30 - 12.45	Training session #1 • Presentation of main changes in section 3 of the standard • Workshop (breakout rooms) • Presentation of group work • Debrief and discussion • Presentation of main changes in section 4 of the standard • Workshop (breakout rooms) • Presentation of group work • Debrief and discussion
12.45 - 13.15	Lunch
13.15 - 16.30	Training session #2 • Presentations of main changes in section 5 of the standard • Workshops (breakout rooms) • Presentation of group work • Debrief and discussion • Presentation of main changes in section 6.1 of the standard • Workshop (breakout rooms) • Presentation of group work • Debrief and discussion
16.30 - 17.00	Open Q&A session Summary of Day 1
17.00	End of Day 1

Procedure for the training

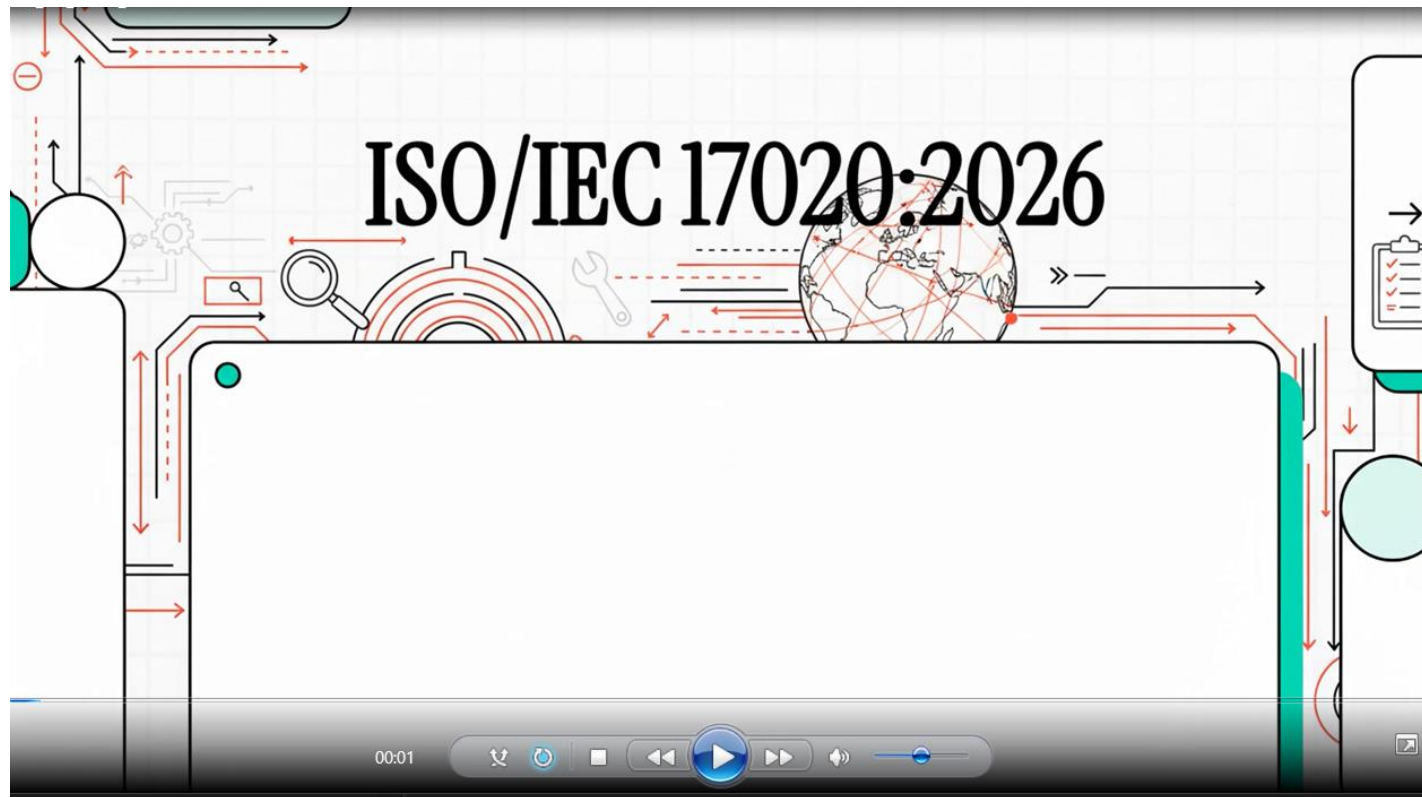
- Agenda

Day 2: Thursday, 2 July 2026, online

Time	Subject
09.00 - 12.45	Training session #3 • Presentation of main changes in sections 6.2 and 6.3 of the standard • Workshop (breakout rooms) • Presentation of group work • Debrief and discussion • Presentations of main changes in section 7 of the standard • Workshops (breakout rooms) • Presentation of group work • Debrief and discussion
12.45 - 13.15	Lunch
13.15 - 16.00	Training session #4 • Presentations of main changes in section 7 of the standard • Workshops (breakout rooms) • Presentation of group work • Debrief and discussion • Presentation of main changes in section 8 of the standard • Workshop (breakout rooms) • Presentation of group work • Debrief and discussion
16.00 - 17.00	Open Q&A session Summary of Day 2
17.00	End of training

Introduction

Video



Section 3 “Terms and definitions”

- **New**
 - 3.7 Client
 - 3.8 Item
- **Changed** (alignment with ISO/IEC 17000:2020)
 - 3.1 Inspection: examination of the item, which is more than product, process and service according to Note 1 to entry
 - 3.3 Inspection scheme: combination of scheme and system
 - 3.4 Impartiality: explicitly related to the outcome of an inspection
 - 3.5 Appeal: client instead of provider being the one to request an appeal
- **Removed**
 - Definitions for product, process, service and inspection system

Section 3 “Terms and definitions”

Tasks for the working groups:

- **Discuss the changes and decide on the consequences of the changes**
- 30 min
- Use tool for presenting results
- Groups 1 and 2 present results in plenary

Sections 4.1 “Impartiality” and 4.2 “Confidentiality”

- **No new requirements in 4.1**
 - All requirements related to impartiality are now in section 4.1
 - “Threats” instead of “risks” (PROC 33)
- **Additional requirement in 4.2**
 - All requirements related to confidentiality are now in section 4.2
 - 4.2.3 "unless agreed by the source" added (PROC 33)

Sections 4.1 “Impartiality” and 4.2 “Confidentiality”

Tasks for the working groups:

- **Discuss the consequences of the changes, e.g. using “threats” instead of “risks”**
- 30 min
- Use tool for presenting results
- Groups 3 and 4 present results in plenary

Section 5.1 “Independence” & Annex A

- **Independence**

- Requirements regarding independence moved to 5.1
- Type A and Non-A
 - Similar competitive items
 - Non-A

Section 5.1 “Independence” & Annex A

Tasks for the working groups:

- Discuss the consequences of the reduction of types A, B, C to type A, type non-A
- Discuss consequences of “similar competitive items” vs. “item inspected” (including interpretation in ILAC P15) and give examples of similar competitive items
- 45 min
- Use tool for presenting results
- Groups 5 and 6 present results in plenary

Section 5.2 “Legal entity and liabilities” and Section 5.3 “Organization and management”

- **Legal entity and liabilities**

- Requirement 5.2.4: Risk-assessment added

- **Organization and management**

- 5.3.1 is combination of requirements; requirement to document procedures to the extent necessary is new
- Requirement to have technical manager(s) is replaced by requirement to have technical management (5.3.2)

Section 5.2 “Legal entity and liabilities” and Section 5.3 “Organization and management”

Tasks for the working groups:

- Discuss the consequences of the addition of risk assessment regarding the provisions covering liabilities
- Discuss consequences of the “technical management concept”
- 30 min
- Use tool for presenting results
- Groups 7 and 8 present results in plenary

Section 6.1 “Personnel”

- 6.1.1: “shall employ or have contract with” is replaced by “shall have access to” (PROC 33)
- 6.1.2. “documented procedure” (how) is replaced by “documented process” (what) (PROC 33)
- 6.1.4 the former requirements regarding the procedure for training are replaced by requirements regarding the actual initial training
- 6.1.5 personnel familiar with inspection methods” is replaced by “authorized and competent personnel” and monitoring program is added
- 6.1.7 “on-site observation” is replaced by “observed performing inspection”
- 6.1.8: requirement regarding training is clarified; meaning is the same

Section 6.1 “Personnel”

Tasks for the working groups:

- **Discuss the consequences of the changes regarding personnel**
- 45 min
- Use tool for presenting results
- Groups 9 and 10 present results in plenary

Section 6.2 “Facilities and equipment” and Section 6.3 “Externally provided products and services”

- 6.2.5 new requirement regarding control of equipment
- 6.2.6 new requirement regarding check of equipment before placed into service
- 6.2.9 new requirement is more general regarding the use of new technology instead of the use of computers and automated equipment. Artificial intelligence is considered being new technology
- Former 6.2.8; use of reference standards only for calibration, is no longer requirement (similar as in ISO/IEC 17025)
- 6.3.4: "to provide the client with an opportunity to object in advance" is added when externally provided services are considered

Section 6.2 “Facilities and equipment” and Section 6.3 “Externally provided products and services”

Tasks for the working groups:

- Discuss the consequences of the changes in section 6.2 and 6.3, especially regarding the assessment of clause 6.2.9 (using new technology) – what do you expect from IBs?
- 45 min
- Use tool for presenting results
- Groups 1 and 2 present results in plenary

Section 7.1 “Review of requests, tenders and contracts”

- 7.1.1 – 7.1.5: the requirements regarding review of requests, tenders and contracts are more detailed (it includes “old” 7.1.5) – it makes the requirements for accepting applications clearer (alignment with ISO/IEC 17025)

Section 7.1 “Review of requests, tenders and contracts”

Tasks for the working groups:

- Does 7.1 help IBs in implementing and ABs to assess the process of accepting applications?
- According to the requirement of clause 7.1.2: is verbal communication with the client sufficient or should an objective evidence be available?
- 30 min
- Use tool for presenting results
- Groups 3 and 4 present results in plenary

Section 7.2 “Inspection methods and procedures”

- 7.2.3 according to the new requirement, standard inspection methods shall be used whenever possible; the former requirement to fully document non-standard methods is replaced by documented, meaning "to the extent needed"
- 7.2.4 – 7.2.6 requirements regarding development of non-standard methods

Section 7.2 “Inspection methods and procedures”

Tasks for the working groups:

- What is the meaning of 7.2.3?
- What does “validation” in clause 7.2.6 mean and what do we as assessors expect?
- 30 min
- Use tool for presenting results
- Groups 5 and 6 present results in plenary

Section 7.3 “Handling of items” and Section 7.4 “Inspection records”

- **Handling of items**

- Basically the same

- **Inspection records**

- New requirement 7.4.3 regarding identification of used equipment, also mentioned in ILAC P15
- New requirement 7.4.4 regarding amendments in records (similar as in ISO/IEC 17025)

Section 7.5 “Control of data and information”

- **Control of data and information**

- New requirements 7.5.1 and 7.5.2: this section doesn't require procedures, but a validated system

Section 7.5 “Control of data and information”

Tasks for the working groups:

- What do we as assessors expect regarding “validation” in clause 7.5.1?
- 20 min
- Use tool for presenting results
- Groups 7 and 8 present results in plenary

Section 7.6 “Inspection report and inspection certificate”

- 7.6.2 content of inspection reports and certificates
 - new requirement regarding inspection results that shall be in the report, only in certificates the results are not mandatory - the condition in former 7.4.3 is now in 7.6.2 h)
 - new requirement regarding the facility name or location of inspection in the report/certificate when relevant (7.6.2 i))
- New 7.6.4 requires inspection reports or certificates to be traceable to inspectors
- New 7.6.6 new requirement regarding reporting in a simplified way when agreed with the client

Section 7.6 “Inspection report and inspection certificate”

Tasks for the working groups:

- What does traceability mean in clause 7.6.4?
- What is acceptable as a simplified report (e.g. Is an e-mail acceptable? What about the reference to accreditation?)
- What does “readily available” mean in clause 7.6.6?
- 30 min
- Use tool for presenting results
- Groups 9 and 10 present results in plenary

Section 7.7 “Handling of appeals” and Section 7.8 “Handling of complaints”

- 7.7 and 7.8: PROC 33

Section 8 “Management system requirements”

- PROC 33 and alignment with other recent CASCO standards
- 8.1 Option B is removed (now quality management system is addressed in clause 8.1.3)
- 8.2.2 new requirement regarding content of policies and objectives
- 8.3 requirement to have procedures to control documents and records is removed; controls shall be implemented and records shall be retained
- 8.4 new requirement regarding risks and opportunities
- 8.5 new requirements in 8.5.3 regarding "nonconforming work"
- 8.6 Internal audits procedure no longer required; at least once every 12 months is no longer required, the frequency can be risk based
- 8.7 conducting a management review at least once every 12 months is no longer required, the frequency can be risk based

Section 8 “Management system requirements”

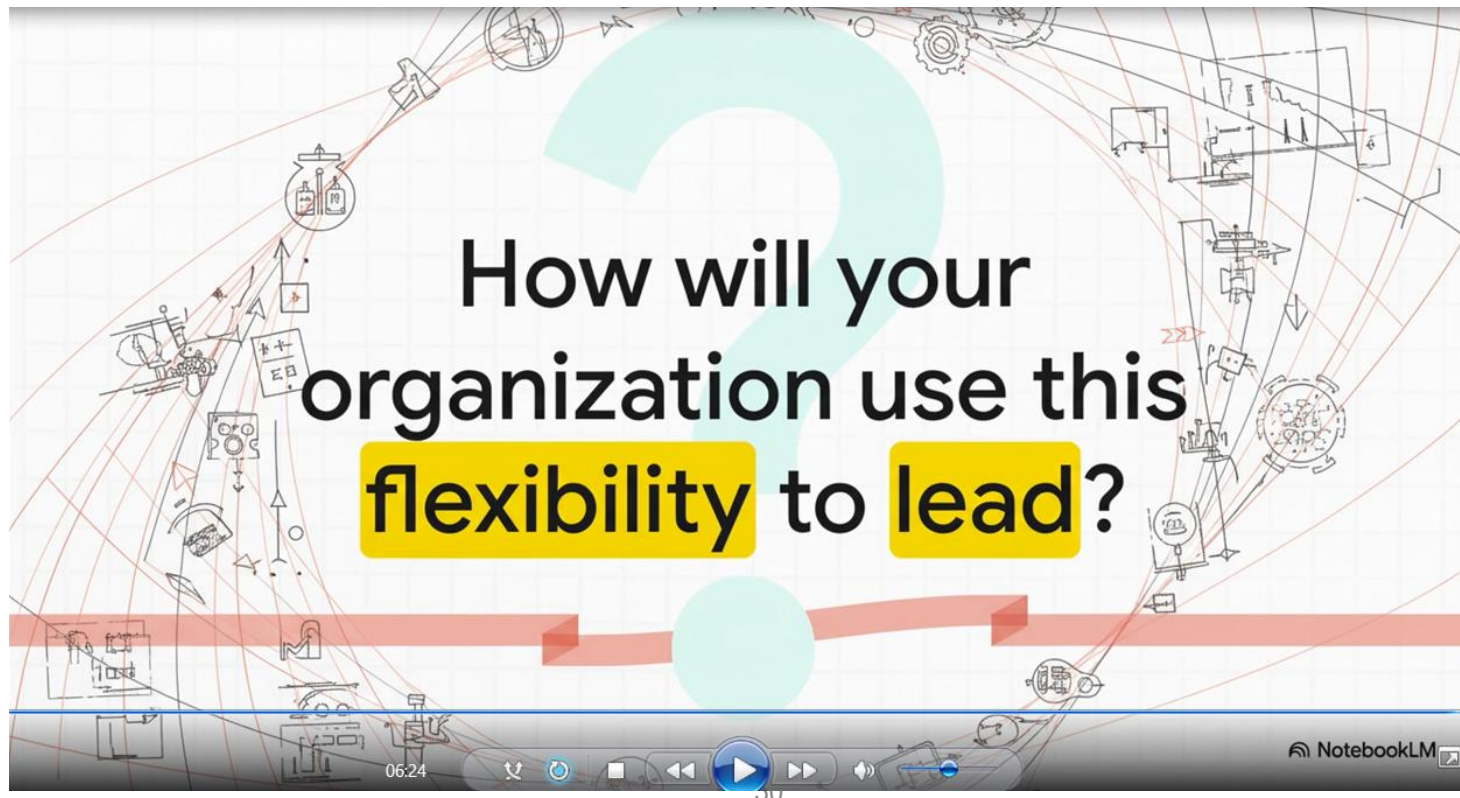
Tasks for the working groups:

- **Discuss section 8 – how do the changes affect assessments of ABs?**
- 60 min
- Use tool for presenting results
- Voluntary groups present results in plenary

Reflection

- *Video*

Was AI right or wrong?



Are there any further questions?

Thank you!

- *Note on feedback/test*

<https://testquiz.webankieta.pl/>



<https://post-trainingsati.webankieta.pl/>

