

Organization and Procedures for the Committee on Standardization of Oilfield Equipment and Materials: Policy Document

API S1

Twenty-fourth Edition, June 2017



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Foreword

The American Petroleum Institute (API) is chartered to promote the interests of the petroleum industry and to encourage the development and dissemination of petroleum technology. Since 1924, API has been the leader in developing voluntary industry standards that promote reliability, efficiency and safety through the use of proven practices. The API Standards Program is accredited by the American National Standards Institute (ANSI), the authority on U.S. standards, and undergoes regular program audits to ensure it meets ANSI's Essential Requirements of openness, balance, consensus and due process. This is the same body that accredits programs at several national laboratories. API's standards are developed through a collaborative effort with industry experts, as well as the best and brightest technical experts from government, academia and other interested stakeholders. The API voluntary standards program is a means to achieve the standards development and technical cooperation objectives. The API Committee on Standardization of Oilfield Equipment and Materials (CSOEM) issues this document in support of the voluntary standards program.

The Board of Directors of the API has authorized the standardization program, a program of licensing manufacturers to use the API Monogram, and a program to register quality management systems. These programs have been delegated to upstream, midstream and downstream segments.

Key Changes

This edition of API S1 contains several changes from the previous version. The following is a list of some of the more significant changes made in this revision:

- a) The API Monogram Program Board was expanded to include the duties of the API QR Technical Advisory Board. The annex describing the API Monogram Program Board was moved into the main text. The name of the board was changed to the APIQR/API Monogram Program Certification and Licensing Board.
- b) Conformance to the various normative references was clarified and material redundant between the references and this document were removed.
- c) Requirements for membership in the CSOEM, the APIQR/API Monogram Program Certification and Licensing Board, subcommittee, and task/work groups was clarified and expanded with clear limitations; including possible removal for non-participation.
- d) The forms used by the CSOEM are now found as links to ensure use of the latest version (see Annex A).
- e) Responsibilities of task group leaders were added.
- f) Responsibilities of API Staff were clarified and attendance requirements for specific activities were added.
- g) The process of creating SRRR for new projects was clarified and expanded.
- h) The color-coding annex was moved into the main text.
- i) International participation was encouraged and the potential use of international work groups was added.
- j) The annex describing the Board of Director's resolution creating the API Monogram program was removed.

1 Scope

This document provides information on policies and procedures for the Committee on Standardization of Oilfield Equipment and Materials (CSOEM), its activities, and guidelines for its conduct. These activities include requirements for developing, adopting, maintaining, and interpreting standards under the jurisdiction of this committee.

2 Normative References

The following references are cited in this document and are indispensable for the application of the requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the reference document (including any amendments) applies.

API Antitrust Compliance Guide

API Procedures for Standards Development

API Document Format and Style Manual

API Operating Procedures for the U.S. Technical Advisory Group (U.S. TAG) to ISO Technical Committee (TC) 67

API Guide for National Adoption of ISO Standards as API/American National Standards

ISO/IEC 17021-1, Conformity assessment—Requirements for bodies providing audit and certification of management systems

3 Terms, Definitions, and Abbreviations

3.1 Definitions

The following definitions apply for the purposes of this document.

3.1.1

addenda

A published portion of an existing standard with substantive changes.

NOTE 1 Substantive changes include revisions, additions, or deletions of material that change how the standard is used or applied and are considered a standards action and require a ballot.

NOTE 2 Addenda can include errata items as well.

3.1.2

API corporate member

An organization that has paid the required fees for current membership in the API.

NOTE API membership is not required to participate in the standards development process, but is encouraged to strengthen governance and industry cooperation.

3.1.3

Company

A legally defined entity.

NOTE "Company" also refers to a parent company and its wholly owned subsidiaries or affiliates.

3.1.4**consensus body**

The group that approves the content of a standard by ballot and by its approval, demonstrates evidence of consensus.

3.1.5**consultant**

A subject matter expert under contract to an interested party other than API.

3.1.6**contracted expert**

A subject matter expert under contract to API for standards development activities.

3.1.7**errata**

A published document containing non-substantive changes to an existing standard.

NOTE Non-substantive changes include editorial errors or inconsistencies that do not affect how the standard is used or applied and therefore do not require a standards action.

3.1.8**General Interest**

An entity that is neither Operator-User nor Manufacturer/Service Supplier but has a direct and material interest in the product, operation, or practice described in the standard.

NOTE This category may include consultants, government, academia and classification societies.

3.1.9**interest category**

A classification that describes members of the CSOEM, its subcommittees or subordinate groups. This can be Operator-User, Manufacturer/Service Supplier, or General Interest.

3.1.10**licensing**

Authorization from API to apply the API Monogram to conforming product.

3.1.11**Manufacturer/Service Supplier**

The entity that is fabricating a product specified in the standard or used in performing the operations or practices described in the standard or the entity that is providing a service in compliance with the standard.

3.1.12**Member**

A person who has been officially designated by the appropriate appointing authority (see Table 1) to represent their company or interest in the standards development activities of the committee, subcommittee, or group to which they are appointed.

3.1.13**Operator-User**

The entity that is using the product specified in the standard or performing the operations or practices described in the standard.

3.1.14**Standard**

A document established by consensus that provides rules, guidelines or characteristics for activities or their results.

NOTE Such documents may be designated as Specifications, Standards, Recommended Practices, Bulletins, or Technical Reports, as defined in the *Procedures for Standards Development*.

3.1.15 standards action

A substantive action taken or decision reached by an API committee or API staff relating to a standard or the manner in which such action was taken or decision was reached.

NOTE Standards actions may include approval of new standards, revision, reaffirmation or withdrawal of existing standards and the decision to nationally adopt an international standard.

3.1.16 US Technical Advisory Group U.S. TAG

A group that develops and transmits, via ANSI, the U.S. positions on activities and ballots of ISO Technical Committees (and as appropriate, subcommittees and policy committees), including the approval, reaffirmation, revision and withdrawal of ISO standards.

3.1.17 voting member

A member of a consensus body that has been designated by their company to vote, and which conforms to the privileges and limitations as defined in this document.

3.2 Abbreviations

ANSI	American National Standards Institute
API	American Petroleum Institute
APIQR	API Quality Registrar
CSOEM	Committee on Standardization for Oilfield Equipment and Materials
GISC	Global Industry Services Committee
ISO	International Organization for Standardization
IWG	International Working Group
MOU	Memorandum of Understanding
NOC	National Oil Company
NSB	National Standards Body
OGC	Office of General Counsel
P-TAG	Policy Technical Advisory Board
QRMPB	APIQR/API Monogram Program Certification and Licensing Board
SRRR	Standards Resource and Research Request
TG	task group
WG	work group

4 General Policies

4.1 Antitrust

Participants in CSOEM standards activities shall comply with this document and the *API Antitrust Compliance Guide*.

API employees shall ensure that activities satisfy antitrust law and this policy. The Office of General Counsel (OGC) should be consulted if there are questions concerning antitrust laws or the application of these requirements. OGC may assist staff or committee members by reviewing agendas and minutes and providing counsel at meetings.

In order to ensure all CSOEM standards developing activities are in alignment with antitrust laws, there shall be

- no discussion or forecasting of prices for goods or services provided or received by a company,
- no sharing or discussion of a company's confidential or proprietary information,
- no discussion of any company's specific purchasing plans, merger/divestment plans, production information, inventories, or costs,
- no discussion of company compliance costs unless publically available,
- no agreement or discussion of the purchase or sale of goods or services,
- no discussion of how individual companies intend to respond to potential market/economic scenarios or government action unless in general terms, and
- no disparaging remarks about specific products, vendors, services, or competitors.

4.2 National and International Standardization

API Standards and the API standardization program are recognized worldwide, and API encourages representatives of companies and organizations involved in the use/manufacture of oilfield equipment and/or provision of exploration- and production-related services to the oil and gas industry in any country to actively participate in the API standardization program.

It is the goal of API to cooperate with international standardization bodies. This requires adequate representation by the different interest categories, as well as close coordination with related efforts by API and other standards developing organizations.

Additionally, API is a member of the American National Standards Institute (ANSI) which is the United States' member body of the International Organization for Standardization (ISO). API standards can be processed through ANSI for designation as American National Standards.

API standards activities shall be conducted in compliance with applicable laws.

5 Committee Organization

5.1 General

Figure 1 illustrates the typical organization and relationship between the different groups within the CSOEM.

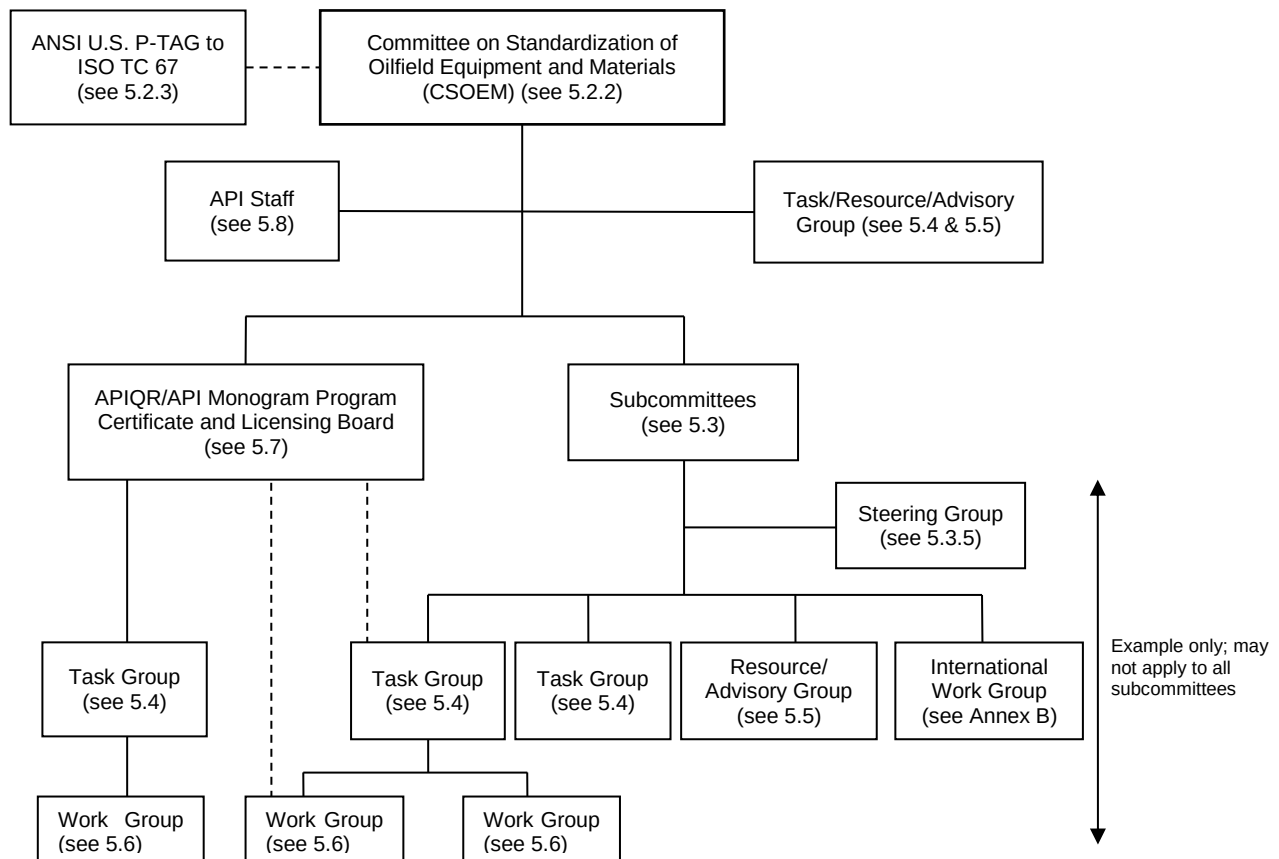


Figure 1—Typical Organization Chart

5.2 Committee on Standardization of Oilfield Equipment and Materials (CSOEM)

5.2.1 Function

The CSOEM supervises the subcommittees reporting to it. It is the ultimate authority over their activity, determines policy relative to all formative and administrative aspects of the standards program, and periodically reviews and approves the scope, priorities, and resource commitments of the work program. It may form and discharge subcommittees and groups as warranted. It considers, accepts, modifies, or rejects all reports of subcommittees. The CSOEM reports to the API Upstream Committee for policy direction and coordinates with the Global Industry Services Committee (GISC) for budget and resource issues.

NOTE Information about API's organization can be found at <http://www.api.org/about/organization>.