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**GUIDELINES FOR IOC INSTITUTIONAL PATRONAGE AND RECOGNITION OF
VIRGIN OLIVE OILS ORGANOLEPTIC ASSESMENT COURSES ORGANIZED BY
COMPETENT AUTHORITIES**

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FOREWORD

The mission of the International Olive Council (IOC) is to spread awareness of the culture of olive growing, the health benefits of olive oil and sustainability in food and agriculture. It is no wonder that UNESCO added the Mediterranean diet, of which extra virgin olive oil is a key component, to its list of intangible world heritage.

The positive and negative sensory attributes of virgin olive oils are clear indicators that distinguish between the different categories. This means of classification is recognised around the world and accessible to a wide range of consumers, producers and stakeholders.

The IOC method for the organoleptic assessment of virgin olive oil (COI/T.20/Doc. No. 15) is applied internationally to classify olive oil. Recognised panels perform the method, and panel members and leaders follow approved standards that govern the equipment they use, how they taste the oils, and how their performance is assessed.

Panels who perform the organoleptic assessment method are trained and qualified in specialised courses organised by entities and experts. However, these courses do not always undergo vigorous recognition processes, nor are they always granted patronage by specialised institutions to verify that they meet all requirements.

So there is a need to make the application of the organoleptic assessment method more robust. There is a need to safeguard the quality of extra virgin olive oil, especially now that the product is under more scrutiny due to increasing adulteration and fraud in world trade. And there is a need to strengthen these systems to stop the proliferation of courses held for ulterior motives, for reasons other than the accurate classification of virgin and extra virgin olive oils.

This document outlines the basic requirements for courses to train tasters and panel leaders. The aim is to preserve the reliability of the method, protect the expertise of recognised panels and their personnel, and prevent speculation, fraud and for-profit activity. Ultimately, our mission is to promote quality olive oils around the world.

SCOPE AND FIELD OF APPLICATION

The scope of these guidelines is to provide basic recommendations and requirements for courses on the organoleptic assessment of virgin olive oils to qualify tasters and panel leaders with the knowledge, skills and competence to work in panels that follow IOC standards.

The IOC may grant its institutional patronage to courses organised by the competent authorities of IOC member and non-member countries. The IOC will not provide financial support for these courses, nor will these courses be held for profit.

Tasters who take part in courses that the IOC institutionally patronages will not automatically obtain recognition as experts.

These guidelines are divided into the following two sections:

Section 1 – Basic requirements for course providers: Organisational requisites

- Management
- Subcontracting
- Records
- Confidentiality; management of independence and conflicts

Section 2 - Basic requirements for courses for the qualification of panel tasters and leaders

- Contents
- Applicants and candidates
- Trainers, instructors, and examiners
- Timetable, location, and materials
- Assessment of knowledge, skills, and competence
- Deliverables, documents, and records

Although these guidelines do not apply to promotional or recreational events (e.g. exhibitions, trade shows, workshops with consumers, schools, etc.), they give basic instructions for recognised course providers so that they can preserve the reliability of the IOC standard method for the organoleptic assessment of virgin olive oils, thus preventing generalisation or disqualification of the method itself.

These guidelines are drawn up on the basis of existing IOC standards: they are dynamic, so they can be updated when new needs arise, and comply with existing international standards, in particular the latest version of ISO/IEC 17024: Conformity assessment – General requirements for bodies operating certification of persons, and in general the latest version of ISO 21001: Educational organizations – Management systems for educational organizations — Requirements with guidance for use.

REFERENCES

ISO/IEC 17024/2017 - CONFORMITY ASSESSMENT — GENERAL REQUIREMENTS FOR BODIES OPERATING CERTIFICATION OF PERSONS

COI/T.20/Doc. No 14 “GUIDE FOR THE SELECTION, TRAINING AND QUALITY CONTROL OF VIRGIN OLIVE OIL TASTERS-QUALIFICATIONS OF TASTERS, PANEL LEADERS AND TRAINERS. “

COI/T.20/Doc. No 15 “METHOD FOR THE ORGANOLEPTIC ASSESSMENT OF VIRGIN OLIVE OIL”

COI/T.28/Doc. No 1 “GUIDELINES FOR THE ACCOMPLISHMENT OF REQUIREMENTS OF STANDARD ISO 17025 OF SENSORY TESTING LABORATORIES WITH PARTICULAR REFERENCE TO VIRGIN OLIVE OIL”

SECTION 1 – REQUIREMENTS AND RECOMMENDATIONS FOR COMPETENT AUTHORITIES ORGANIZING COURSES ON THE ORGANOLEPTIC ASSESSMENT OF VIRGIN OLIVE OILS FOR TASTERS AND PANEL LEADERS TO OBTAIN IOC INSTITUTIONAL PATRONAGE

Patronage authorises and recognises courses to qualify tasters and panel leaders with the appropriate knowledge, skills and competence to work in IOC-approved panels.

1.1- Providers

Providers are competent authorities or public bodies, established as legal entities or part of legal entities authorised by the competent authorities based on the basic requirements.

The policies and procedures governing providers and their administration will meet the criteria under which qualification of tasters and panel leaders is sought, and will comply with all applicable regulations, statutory requirements and international standards regarding the qualification of tasters and panel leaders for the organoleptic assessment of virgin olive oils.

Providers will be structured in such a way as to ensure their competence, impartiality¹, and integrity.

The provider will give evidence of their independent and impartial role, including that of their employees, through verified declarations.

They will identify the management group(s) or person(s) that are responsible for creating courses for tasters and panel leaders regarding:

- Technical and administrative tasks
- Evaluation, qualification, and surveillance of the applicable IOC standards
- Decisions on qualifications of employed people
- The implementation of policies and procedures
- Financial management

The provider should have a documented structure that safeguards impartiality¹, including provisions to assure impartiality, and that defines the methods and mechanisms for assessing candidates.

The provider should have the financial resources to cover the qualification of tasters and panel leaders and to cover liabilities. They must declare that they are **non-profit** and have justified costs and fees.

The provider should define policies and procedures (e.g. a code of conduct) for the resolution of appeals and complaints issued by applicants, candidates and other parties involved in the qualification process.

¹ ISO definition: “*Impartiality: presence of objectivity*”.

Objectivity means that conflicts of interest do not exist, or are resolved, so as not to adversely influence subsequent activities in the assessment of knowledge, skills, and competence of tasters and panel leaders.

Other terms that are useful in conveying the element of impartiality are: independence, freedom from conflict of interests, freedom from bias, lack of prejudice, neutrality, fairness, open-mindedness, even-handedness, detachment, balance.

The provider will employ enough people with the necessary education, training, technical knowledge and experience to perform qualification functions relating to tasters and panel leaders for the organoleptic assessment of virgin olive oil under the IOC standards.

1.2- Subcontracting²

When a provider decides to subcontract work related to courses (e.g. administrative tasks, training, communication, examination, etc.) to an external body or persons, a properly documented agreement covering the arrangement, including confidentiality and prevention of conflicts of interest³, should be drawn up.

The final decision on qualification should not be subcontracted.

The provider must ensure that the subcontractor is competent and meets the requirements to perform the subcontracted tasks, and is not involved, either directly or through their employees, with training or the qualification of tasters and panel leaders in such a way that may compromise confidentiality and impartiality.

1.3- Patronage schemes for courses to qualify tasters and panel leaders to work in panels recognised by the IOC

Schemes to certify tasters and panel leaders should be set up to meet specific institutional requirements or a demonstrated need or desire to cover open positions or to create panels.

A provider requesting IOC patronage for courses on the organoleptic assessment of virgin olive oils for tasters and panel leaders must include the following information on the application form:

- a) The full programme of the course, including all training documents and material descriptions;
- b) The person in charge of developing the course, the organisation of tasks, the list of people involved, their affiliation and their appointed tasks, also for teachers/trainers/examiners, who must be IOC experts or members of an IOC-recognised panel.
- c) The description of the target applicants and their specific prerequisites, the limited number of candidates admitted, a pre-selection procedure when applicable, and reasoning behind a maximum number of candidates.
- d) A specification for any formal oral/written/practical examination(s), and the mark scheme of the qualification: all examinations must conform to the examination specification, be applied uniformly, and be free from bias. All information about the course must be approved by the IOC. Only when an organoleptic assessment course complies with the scopes and the requirements, the IOC may grant its institutional patronage.

² The terms "subcontracting" and "outsourcing" are considered synonymous.

³ Conflict of interest: a set of circumstances that creates a risk that an individual's ability to apply judgment or act in one role is, or could be, impaired or influenced by a secondary interest. It can occur in any situation where an individual or organization (private or government) can exploit a professional or official role for personal or other benefit. This definition is based on generally accepted standards.

1.4- Reports

At the end of a course, the provider will draw up a final report, attaching all the documents related to the course.

The IOC may request additional information.

SECTION 2 – COURSES PATRONAGED BY THE IOC FOR QUALIFYING TASTERS AND PANEL LEADERS FOR THE ORGANOLEPTIC ASSESSMENT OF VIRGIN OLIVE OIL

2.1 Courses for tasters

As stated in document COI/T.20/Doc. No. 14 point 3, tasters must be selected carefully.

The standards ISO 8586, ISO 5496 and ISO 3972 describe several types of method for a preliminary categorisation of sensory assessors with special regard to their sensitivity to odours and tastes. The detailed procedures of point 3.2. (Determination of the detection threshold of the group of candidates for characteristic attributes) and point 3.3. (Selection of tasters by the intensity rating method) of COI/T.20/Doc. No 14 are specifically mentioned for determining the olfactory discriminatory ability of people who intend to become tasters of virgin olive oil.

2.1.1 Training of tasters

As stated in COI/T.20/Doc. No 14, taster training should consist of both theoretical and practical components. A theoretical background on sensory analysis and generally on olive oil is a valuable tool for the correct application of the sensory method.

The basic theoretical and practical topics for training tasters are mentioned in COI/T.20/Doc. No 14 point 4.2 and are also included in tables 1.1. and 1.2. of the annex to this document.

The practical component includes the final assessment of tasters following the procedure outlined in COI/T.20/Doc. No 14.

For tasters intending to work in panels under IOC standards for the classification and certification of the organoleptic attributes of virgin olive oils against their declared category, as defined in the international trade standards, additional topics include focus on national and international laws, regulations and trade standards, and on official procedures for the classification and certification of virgin olive oil.

A template of the timetable of a course for tasters is provided in section 1 of the annex.

Additional activities may include visits to olive mills, olive oil plants, and recognised panels.

2.1.2- Applicants/candidates

A candidate's objective should be to become a member of a virgin olive oil tasting panel working under IOC standards.

There are no other specific pre-requisites for applying to these courses.

However, the provider may define specific requisites for applicants, for example, their affiliation to a specific institute or residence, etc.

Although there are no provisions for the maximum number of candidates, it is recommended to limit places in courses, to allow teachers, trainers and examiners to give candidates the adequate knowledge, skills and competence to work under recognition schemes, and to help trainees achieve the highest qualification possible. A recommended number of candidates is no more than 25.

When defining the number of candidates, the provider should analyse the effective and logistic needs.

2.2- Courses for panel leaders

2.2.1- Contents

As stated in COI/T.20/Doc. No 14, since applicants for the position of panel leader already have proven experience in the classification and certification of the organoleptic attributes of virgin olive oils against their declared category, as defined in the international trade standards, special training is needed for panel leaders besides taster training. The basic topics for training panel leaders are outlined in COI/T.20/Doc. No 14, point 7.2. and are also included in table 2.1. of the annex of this document.

The duties of panel leaders are described in detail in point 8.1 of COI/T.20/Doc. No 15 “Method for the organoleptic assessment of virgin olive oil”.

For panel leaders intending to work in panels under IOC standards for the organoleptic assessment of virgin olive oils, additional topics include IOC standards, methods and guidelines, and official procedures for the classification and certification of virgin olive oil.

A template of the timetable of a course for panel leaders is provided in section 2 of the annex.

Additional activities may include visits to olive mills, olive oil plants, and recognised panels.

Practical activities also include:

- Olive oil tasting aimed at harmonising the classification of virgin olive oils;
- Assessing the knowledge, skills and competence of panel leader candidates.

2.2.2- Applicants/candidates

See point 7.2, COI/T.20/Doc. No 14

Applicants should have continuous years of relevant work experience in sensory analysis (i.e., they must have been a taster in a recognised panel) before being considered for the role of panel leader. In addition, they should have documented knowledge of:

- The types of oils they will encounter during their work
- Statistical analysis
- Software for elaboration of documents and calculations

The number of participants in panel leader courses is defined and limited based on the effective needs of existing recognised panels to cover open positions, or the effective needs of institutions to implement new recognised panels.

Applications for the role of panel leader will be promoted by the institute where the recognised panel is located, or by the institute where it is planned to implement a new panel.

2.3- General requirements

2.3.1- Teachers, trainers, examiners

The general requirements for teachers, trainers and examiners are outlined in COI/T.20/Doc. No 14, point 7.3 and verified by providers, based on proven curricula and experience.

Teachers and trainers should use approved educational or instructional documents, materials, and apparatus for the course content.

For the final assessment of the tasters and panel leaders, examiners⁴ should follow protocols and apply objective tools agreed upon with providers, such as questionnaires, interviews, scoring methods, etc., to prevent conflicts of interests.

See point 4.4 of COI/T.20/Doc. No 14 for recommended procedures for the statistical evaluation of the results of tasters during a training course and proposed criteria for successful training attendance.

Examiners should sign a document in which they commit to comply with the rules defined by the provider, including those relating to confidentiality and independence from commercial and other interests, and from any prior and/or present link with candidates that may compromise impartiality.

2.3.2- Duration

See recommendations in point 4.1, COI/T.20/Doc. No 14.

Although the recommended timetable can be done over five consecutive full working days (40 hours), a different timetable may need to be defined, e.g. non-consecutive days or fewer hours over more days, in order to reduce the stress on trainees.

The recommended five days includes time to develop the content and activities, and the time needed for the final assessment.

⁴ Examiner: person competent to conduct and score an examination, where the examination requires professional judgment

Examination: mechanism that is part of the assessment which measures a candidate's competence by one or more means, such as written, oral, practical and observational, as defined in the certification scheme (ISO definitions)

2.3.3- Location and equipment

To ensure that training courses prepare candidates to work in recognised panels, they must familiarise themselves with the proper equipment and learnt to operate under the working conditions defined by the IOC method as early as possible.

The course provider will provide adequate classrooms, premises, and tasting room(s) for hosting trainees comfortably, and in line with standards.

The tasting room(s) and equipment should comply with the relevant IOC standards.

Theoretical lectures may also be held virtually, but lessons must be livestreamed, not pre-recorded, so students can ask questions and interact with their teachers. All practical lessons and organoleptic assessments must be carried out according to IOC standards, methods and guidelines. It is mandatory that the final examination is presential.

The established condition of locations and equipment must be maintained for the duration of the course.

2.3.4- Attestations

A positive assessment of the knowledge, skills and competence of candidates attests to their eligibility for the role of taster or panel leader intending to perform the organoleptic assessment of virgin olive oils.

A personal attestation contains references from the provider, and includes information on the patronage, dates and location of the course, the name of the qualified candidate, the declaration of their eligibility, and signatures of the responsible of the course, a representative of the IOC, and the examiner(s).

The hard copy of the attestation is given to successful candidates.

An attestation does not give candidates the right to declare IOC recognition and does not have any reference to the IOC and the IOC logo.

2.3.5- Documents and records

The provider will keep records of all activities related to the course and the collection of the relevant documents.

Records include:

- Appointment of supervisors and of the personnel involved
- Appointment of teachers, trainers and examiners and their tasks
- Curricula
- Declarations of absence of conflicts of interests
- List of materials and apparatus to be used
- List of applicants and successful candidates

- Registry of attendance
- Registry of the final assessment
- Anomalies
- List of successful candidates
- Attestations
- Communications

Documents include:

- Statutory documents for legal identification of the provider
- Approved programme of the course
- Call for applications
- Educational documents
- Final report

Educational material should be shared with participants under agreed rules regarding intellectual property rights.

ANNEX

SECTION 1 – RECOMMENDED PROGRAMME FOR COURSES FOR TASTERS

The programme for courses for eligible tasters of virgin olive oil is a document that provides the following information:

- Clear definition of the provider (competent authority)
- Dates
- Location(s) of individual activities
- Daily timetable
- Description of individual modules
- Mode: in class, virtual classrooms
- Name and affiliation of teachers/trainers/examiners for each module
- Contact points of management.

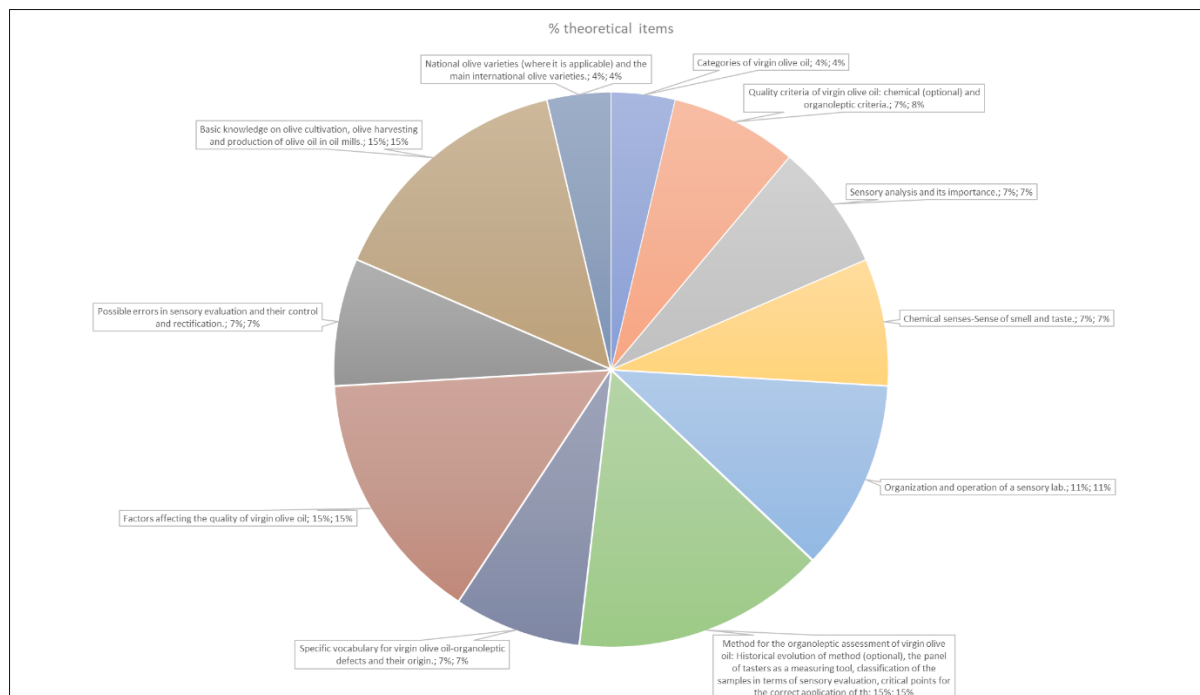
The programme includes the course introduction, the final attestations, and optional supplementary activities (e.g. social events, transfers, etc.).

1.1 Theoretical contents

Item	Recommended time (h)	Weight
Categories of virgin olive oil	1	4%
Quality criteria of virgin olive oil: chemical (optional) and organoleptic criteria	2	7%
Sensory analysis and its importance	2	7%
Chemical senses – sense of smell and taste	2	7%
Organization and operation of a sensory lab	3	11%
Method for the organoleptic assessment of virgin olive oil: Historical evolution of method (optional), the panel as a measuring tool, classification of the samples in terms of sensory evaluation, critical points for the correct application of the method	4	15%
Specific vocabulary for virgin olive oil – organoleptic defects and their origin	4	15%
Factors affecting the quality of virgin olive oil	2	7%
Possible errors in sensory evaluation and their control and rectification	2	7%
Basic knowledge on olive cultivation, olive harvesting and updated production/technologies of olive oil in oil mills (also during visits to facilities/mills)	4	15%
National olive varieties (where applicable) and the main international olive varieties	1	4%

Note 1: Highlighted items may be managed overlapping practical activities.

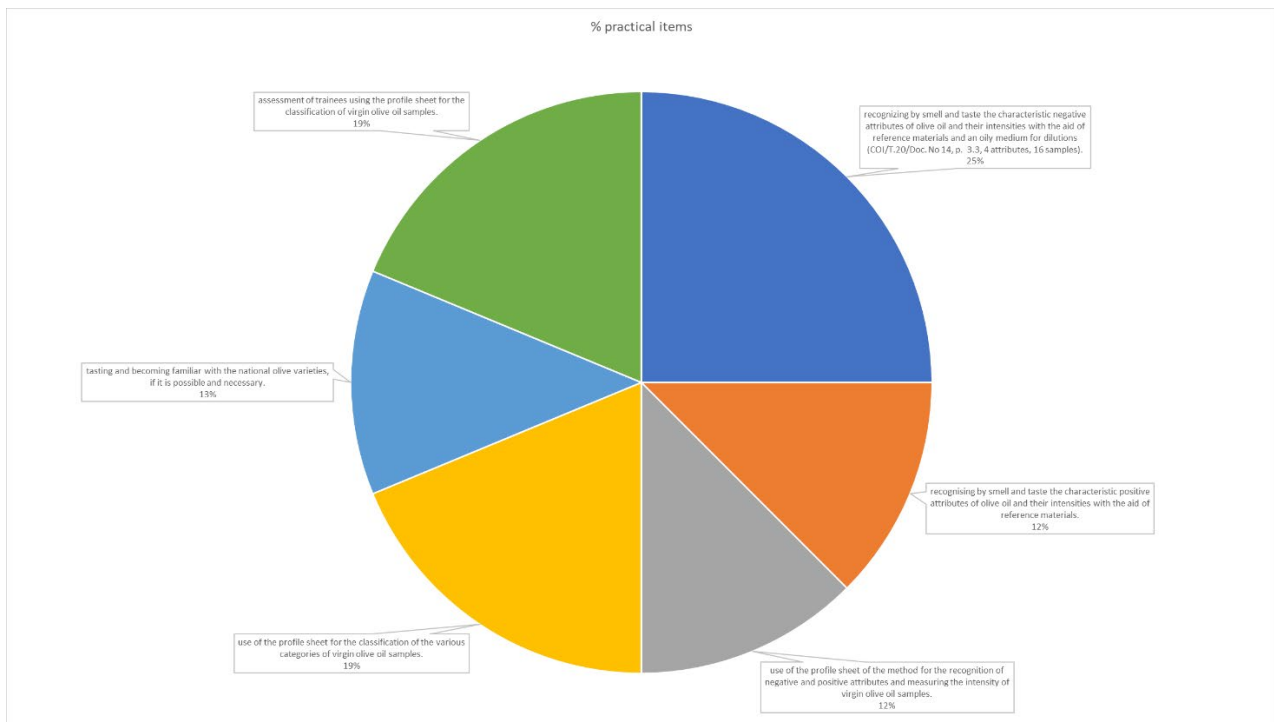
Note 2: Theoretical items may be merged and treated in individual modules.



1.2 Practical contents

Item	Recommended time (h)	Weight
Recognising by smell and taste the characteristic negative attributes of olive oil and their intensities with the aid of reference materials and an oily medium for dilutions (COI/T.20/Doc. No 14, p. 3.3, four attributes, 16 samples)	4	25%
Recognising by smell and taste the characteristic positive attributes of olive oil and their intensities with the aid of reference materials	2	13%
Use of the profile sheet of the method for recognising negative and positive attributes and measuring the intensity of samples of virgin olive oil	2	13%
Use of the profile sheet for classifying the various categories of samples of virgin olive oil	3	19%
Tasting and becoming familiar with national/international olive varieties, if possible/necessary	2	13%
Assessment of trainees using the profile sheet for classifying samples of virgin olive oil	3	19%

Note 1: Highlighted items may be managed overlapping theoretical activities



SECTION 2 – RECOMMENDED PROGRAMME FOR COURSES FOR PANEL LEADERS

The programme for courses for eligible panel leaders is a document that provides the following information:

- Clear definition of the provider (competent authority)
- Dates
- Location(s) of individual activities
- Daily timetable
- Description of individual modules
- Mode: in class, virtual classrooms
- Name and affiliation of teachers/trainers/examiners for each module
- Contact points of management

The programme includes the course introduction, the final attestations, and optional supplementary activities (e.g. social events, transfers, etc.).

2.1 Theoretical/Practical contents

Item	Recommended time (h)	Weight
IOC standards	2	5%
Criteria for the recognition of the tasting panels	2	5%
All IOC rules concerning the organoleptic assessment of virgin olive oil	6	15%
Tasks and responsibilities of the panel leader	2	5%
Selection of test procedures, experimental design and analysis	2	5%

Reception and storage of the samples before and after being tested	1	3%
Preparation, coding and presentation of the samples to the tasters	1	3%
Organisation and performance of the tests	1	3%
Data input and processing	1	3%
Preparation of reports	1	3%
Maintenance of records	1	3%
Maintenance of all necessary supplies and services	1	3%
Sensory assessor screening, selection, training and monitoring procedures	3	8%
Importance of the assessor's health and safety	1	3%
Human resources management (useful for the motivation of the panel members)	1	3%
Training in quality management system and ISO-17025	2	5%
Scientific overview of organoleptic properties of olive oils (optional)	2	5%
Practical tests for evaluating and classifying virgin olive oils	8	20%
Assessment of knowledge/skills/competence of candidates	2	5%

Note 1: Theoretical/practical items may be merged and treated in individual modules.

