ISO 14521:2026-09 (E)

Gears - Calculation of load capacity of worm gears

Contents

Page

Foreword vi

Introduction vii

1 Scope 1

2 Normative references 1

3 Terms and definitions 1
3.1 Terms and definitions 1
3.2 Symbols 1

4 General consideration 7
4.1 Worm gear load capacity rating criteria 7
4.2 Basis of the method 8
4.3 Concept of absolute and relative parameters 8
4.4 Applicability 10
4.5 Validity 10
4.6 System considerations 11
4.7 Calculation methods A, B, C 12
4.7.1 Generality on methods A, B and C 12
4.7.2 Notes on numerical formulae 12
4.7.3 Base conditions, interaction 12
4.7.4 Other notes 13
4.8 Standard reference gear 13

5 Required data for calculation 14
5.1 Input variable 14
5.2 Safety factors 15

6 Forces, speeds and parameters for the calculation of stresses 15
6.1 General 15
6.2 Tooth forces 15
6.2.1 Application factor 15
6.2.2 Dynamic factor 15
6.2.3 Load distribution factor 16
6.2.4 Tooth force components 16
6.3 Sliding velocity at reference diameter 17
6.4 Physical parameters 17
6.4.1 Generality on physical parameters 17
6.4.2 Parameter for the mean Hertzian pressure 18
6.4.3 Parameter for the mean minimum lubricant film thickness 19
6.4.4 Parameter for the mean sliding path 21
6.5 Calculation of mean contact stress 21
6.6 Calculation of mean minimum lubricant film thickness 22
6.7 Calculation of the wear path 23
6.8 Calculation of the lubricant kinematic viscosity 23

7 Efficiencyandpowerloss 23
7.1 General 23
7.2 Total efficiency 24
7.2.1 Method A 24

7.2.2 Method B ... 24
7.3 Total power loss ... 24
7.3.1 Methods of calculation ... 24
7.3.2 Idle running power loss ... 25
7.3.3 Bearing load power loss ... 25
7.3.4 Sealing power loss ... 25
7.3.5 Adaptation of the calculation procedure to a specific test ... 26
7.4 Gear efficiency ... 26

7.4.1 Efficiency calculation ... 26
7.4.2 Base coefficient of friction, μOT, of the standard reference gear ... 26
7.4.3 Size factor ... 28
7.4.4 Geometry factor ... 29
7.4.5 Material factor ... 29
7.4.6 Roughness factor ... 29
7.4.7 Adaptation of the calculation procedure to a specific test ... 29
7.5 Meshing power loss ... 30
7.5.1 Method A ... 30
7.5.2 Method B ... 30
7.5.3 Method C ... 30

8 Wear load capacity ... 30
8.1 General ... 30
8.2 Wear safety factor ... 30
8.3 Expected wear ... 31
8.3.1 Method A ... 31
8.3.2 Methods B, C ... 31
8.4 Permissible wear ... 35
8.5 Adaptation of the calculation procedure to a specific test ... 36

9 Surface durability (pitting resistance) ... 36
9.1 General ... 36
9.2 Pitting safety factor ... 36
9.3 Actual contact stress ... 37
9.3.1 Method A ... 37
9.3.2 Methods B, C ... 37
9.4 Limiting value of the contact stress ... 37
9.4.1 General ... 37
9.4.2 Life factor ... 37
9.4.3 Velocity factor ... 37
9.4.4 Size factor ... 38
9.4.5 Gear ratio factor ... 38
9.4.6 Lubricant factor ... 38
9.5 Adaptation of the calculation procedure to specific test ... 38

10 Wormdeflection ... 38
10.1 General ... 38
10.2 Worm deflection safety factor ... 39
10.3 Actual worm deflection ... 39
10.3.1 Method A ... 39
10.3.2 Method B ... 39
10.3.3 Method C ... 39
10.4 Limiting value of the worm deflection ... 40

11 Tooth root strength ... 40
11.1 Safety factor for tooth breakage ... 40
11.2 Actual tooth root stress ... 41
11.2.1 Method A ... 41
11.2.2 Method B ... 41
11.2.3 Method C ... 41
11.3 Limiting value of the shear stress at tooth root ... 42
11.3.1 General ... 42

11.3.2 Shear stress endurance limit, F lim T 42
11.3.3 Life factor, YNL 43
11.4 Adaptation of the calculation procedure to a specific test 45

12 Temperature safety factor 45
12.1 Temperature safety factor for splash lubrication 45
12.1.1 General 45
12.1.2 Determination of the oil sump temperature 45

12.1.3 Limiting values of the oil sump temperature 46
12.2 Temperature safety factor for oil spray lubrication 47
12.2.1 General 47
12.2.2 Cooling capacity PK 47

13 Determination of the wheel bulk temperature 48
13.1 Wheel bulk temperature with splash lubrication 48
13.1.1 General 48
13.1.2 Method A 48
13.1.3 Method B 48
13.1.4 Method C 48
13.2 Wheel bulk temperature with spray lubrication 49
13.2.1 General 49
13.2.2 Method A 49
13.2.3 Method B 49
13.2.4 Method C 49

Annex A (informative) Notes on physical parameters 51

Annex B (normative) Methods for the determination of the physical parameters for mean Hertzian pressure and general algorithms for Method B 52

Annex C (normative) Physical parameter for the mean minimum lubricant film thickness according to the Elasto Hydrodynamic Lubrication (EHL) theory 61

Annex D (normative)Wearpathdefinition-Physicalparameterforthemeanslidingpath 64

Annex E (informative) Notes on calculation wear 68

Annex F (informative) Notes on tooth root strength 69

Annex G (informative) Adaptation of formulae for the reference gear with results from testing 70

Annex H (informative) Lifetime estimation for worm gears with a high risk of pitting damage 73

Annex I (informative) Examples 75

Annex J (informative) Examples of limit load capacity in a range of working conditions 92

Bibliography 94