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Asset management - Overview, principles and terminology

Gestion d'actifs - Aperçu général, principes et terminologie

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**Asset management — Overview,
principles and terminology**

Gestion d'actifs — Aperçu général, principes et terminologie

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ISO 55000:2014(E)**Foreword**

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: Foreword - Supplementary information

The committee responsible for this document is Project Committee ISO/PC 251, *Asset management*.

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Introduction

0.1 Purpose

This International Standard provides an overview of asset management and asset management systems (i.e. management systems for the management of assets). It also provides the context for ISO 55001 and ISO 55002.

International cooperation in the preparation of these standards has identified common practices that can be applied to the broadest range of assets, in the broadest range of organizations, across the broadest range of cultures.

0.2 Relationship with other standards

ISO 55001, ISO 55002 and this International Standard relate to a management system for asset management, which is referred to as an “asset management system” throughout the three standards.

ISO 55001, ISO 55002 and this International Standard can be used in combination with any relevant sector or asset type-specific asset management standards and technical specifications. ISO 55001 specifies requirements for an asset management system, while the other standards detail sector-specific, asset-specific or activity-specific technical requirements or give guidance on how ISO 55001 should be interpreted and applied within a specific sector or to particular asset types.

0.3 Target audience

This International Standard is primarily intended for use by:

- those considering how to improve the realization of value for their organization from their asset base
- those involved in the establishment, implementation, maintenance and improvement of an asset management system
- those involved in the planning, design, implementation and review of asset management activities; along with service providers.

0.4 Benefits of the standards

The adoption of ISO 55001, ISO 55002 and this International Standard enables an organization to achieve its objectives through the effective and efficient management of its assets. The application of an asset management system provides assurance that those objectives can be achieved consistently and sustainably over time.

[Annex A](#) provides additional information on areas related to asset management activities.

[Annex B](#) shows the relationship between key elements of an asset management system.

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Asset management — Overview, principles and terminology

1 Scope

This International Standard provides an overview of asset management, its principles and terminology, and the expected benefits from adopting asset management.

This International Standard can be applied to all types of assets and by all types and sizes of organizations.

NOTE 1 This International Standard is intended to be used for managing physical assets in particular, but it can also be applied to other asset types.

NOTE 2 This International Standard does not provide financial, accounting or technical guidance for managing specific asset types.

NOTE 3 For the purposes of ISO 55001, ISO 55002 and this International Standard, the term “asset management system” is used to refer to a management system for asset management.

2 Asset management

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2.1 General

The factors which influence the type of assets that an organization requires to achieve its objectives, and how the assets are managed, include the following:

- the nature and purpose of the organization;
- its operating context;
- its financial constraints and regulatory requirements;
- the needs and expectations of the organization and its stakeholders.

These influencing factors need to be considered when establishing, implementing, maintaining and continually improving asset management.

Effective control and governance of assets by organizations is essential to realize value through managing risk and opportunity, in order to achieve the desired balance of cost, risk and performance. The regulatory and legislative environment in which organizations operate is increasingly challenging and the inherent risks that many assets present are constantly evolving.

The fundamentals of asset management and the supporting asset management system introduced in this International Standard, when integrated into the broader governance and risk framework of an organization, can contribute tangible benefits and leverage opportunities.

Asset management translates the organization’s objectives into asset-related decisions, plans and activities, using a risk based approach.

2.2 Benefits of asset management

Asset management enables an organization to realize value from assets in the achievement of its organizational objectives (see 2.5.3.4). What constitutes value will depend on these objectives, the nature and purpose of the organization and the needs and expectations of its stakeholders. Asset management

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supports the realization of value while balancing financial, environmental and social costs, risk, quality of service and performance related to assets.

The benefits of asset management can include, but are not limited to the following:

- a) **improved financial performance:** improving the return on investments and reducing costs can be achieved, while preserving asset value and without sacrificing the short or long-term realization of organizational objectives;
- b) **informed asset investment decisions:** enabling the organization to improve its decision making and effectively balance costs, risks, opportunities and performance;
- c) **managed risk:** reducing financial losses, improving health and safety, good will and reputation, minimizing environmental and social impact, can result in reduced liabilities such as insurance premiums, fines and penalties;
- d) **improved services and outputs:** assuring the performance of assets can lead to improved services or products that consistently meet or exceed the expectations of customers and stakeholders;
- e) **demonstrated social responsibility:** improving the organization's ability to, for example, reduce emissions, conserve resources and adapt to climate change, enables it to demonstrate socially responsible and ethical business practices and stewardship;
- f) **demonstrated compliance:** transparently conforming with legal, statutory and regulatory requirements, as well as adhering to asset management standards, policies and processes, can enable demonstration of compliance;
- g) **enhanced reputation:** through improved customer satisfaction, stakeholder awareness and confidence;
- h) **improved organizational sustainability:** effectively managing short and long-term effects, expenditures and performance, can improve the sustainability of operations and the organization;
- i) **improved efficiency and effectiveness:** reviewing and improving processes, procedures and asset performance can improve efficiency and effectiveness, and the achievement of organizational objectives.

2.3 Assets

An asset is an item, thing or entity that has potential or actual value to an organization. The value will vary between different organizations and their stakeholders, and can be tangible or intangible, financial or non-financial.

The period from the creation of an asset to the end of its life is the asset life (see 3.2.2). An asset's life does not necessarily coincide with the period over which any one organization holds responsibility for it; instead, an asset can provide potential or actual value to one or more organizations over its asset life, and the value of the asset to an organization can change over its asset life.

An organization may choose to manage its assets as a group, rather than individually, according to its needs, and to achieve additional benefits. Such groupings of assets may be by asset types, asset systems, or asset portfolios.

2.4 Overview of asset management**2.4.1 General**

An organization's top management, employees and stakeholders should implement planning, control activities (e.g. policies, processes or monitoring actions) and monitoring activities, to exploit opportunities and to reduce risks to an acceptable level.

Asset management involves the balancing of costs, opportunities and risks against the desired performance of assets, to achieve the organizational objectives. The balancing might need to be considered over different timeframes.

Asset management enables an organization to examine the need for, and performance of, assets and asset systems at different levels. Additionally, it enables the application of analytical approaches towards managing an asset over the different stages of its life cycle (which can start with the conception of the need for the asset, through to its disposal, and includes the managing of any potential post disposal liabilities).

2.4.2 Fundamentals

Asset management is based on a set of fundamentals.

- a) **Value:** Assets exist to provide value to the organization and its stakeholders.

Asset management does not focus on the asset itself, but on the value that the asset can provide to the organization. The value (which can be tangible or intangible, financial or non-financial) will be determined by the organization and its stakeholders, in accordance with the organizational objectives.

This includes:

- 1) a clear statement of how the asset management objectives align with the organizational objectives;
- 2) the use of a life cycle management approach to realize value from assets;
- 3) the establishment of decision-making processes that reflect stakeholder need and define value.

- b) **Alignment:** Asset management translates the organizational objectives into technical and financial decisions, plans and activities.

Asset management decisions (technical, financial and operational) collectively enable the achievement of the organizational objectives.

This includes:

- 1) the implementation of risk-based, information-driven, planning and decision-making processes and activities that transform organizational objectives into asset management plans (see [2.5.3.4](#));
- 2) the integration of the asset management processes with the functional management processes of the organization, such as finance, human resources, information systems, logistics and operations;
- 3) the specification, design and implementation of a supporting asset management system.

- c) **Leadership:** Leadership and workplace culture are determinants of realization of value.

Leadership and commitment from all managerial levels is essential for successfully establishing, operating and improving asset management within the organization.

This includes:

- 1) clearly defined roles, responsibilities and authorities;
- 2) ensuring that employees are aware, competent, and empowered;
- 3) consultation with employees and stakeholders regarding asset management.

- d) **Assurance:** Asset management gives assurance that assets will fulfil their required purpose.