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Standard**

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**Construction project governance —
Guidance on delivery management**

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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 document 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).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 59, *Buildings and civil engineering works*, Subcommittee SC 18, *Construction procurement*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

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Introduction

The way clients approach procurement has a major influence on how the industry behaves, performs and, ultimately, delivers value in projects. For each individual project or group of projects, the client's procurement strategy is what orchestrates the collaboration between design professionals, contractors and subcontractors, ensuring that client requirements are met efficiently and effectively (as outlined in ISO 10845-1). Procurement processes not only bring together these various contributors but also establish the terms of engagement, defining the roles, responsibilities, and risks that bind the parties, with the aim of achieving value for money and maximizing project outcomes.

ISO 21502 offers guidance on concepts and practices for project management that are important for and have an impact on a project's successful delivery. It is intended to apply to any public or private organization, as well as any type of project within any industry, regardless of the purpose, delivery approaches, life cycle model used, complexity, size, cost or duration. However, industry-specific adaptations of ISO 21502 are necessary for construction works projects.

The adaptations which are necessary to accommodate the specificities of the construction industry include:

- the need to simultaneously address the geography, site conditions, communities, physical environments, existing construction works, as well as a wide range of stakeholder requirements, client's value proposition and project constraints;
- an ever-changing, complex environment, often with a high degree of known and unknown risks;
- the scale and complexity of projects require high-impact evidence-based decision making with material implications for cost and outcomes;
- the frequent one-of-a-kind product which is delivered on a particular site rather than mass-produced items delivered in a factory environment;
- the frequent integration of built environment professions and engineering disciplines in the design and delivery processes;
- the delivery of a project in phases, which provides an opportunity to review and refine the project design and implementation strategy, as well as to validate the investment intention;
- the industry being almost entirely based on a competitive market environment for project cost, schedule and performance delivery;
- the nature of the contracting construction businesses which are paid for work in progress and become a conduit for payment to those businesses who do the actual work;
- projects being delivered through multiple contracts where:
 - the individual pieces in a single project have no value without every other piece being successfully completed;
 - requirements (specifications), availability of resources (supply-side issues) and the context (how and why projects take place) can change between project inception and completion, particularly where there is an appreciable time between these milestones;
- the involvement of different combinations of funders, professionals, site conditions, materials and technologies and general contractors, specialist contractors, skills and workforces on each project;
- the development or utilization of land;
- the magnitude of individual transactions which can form a major portion of the annual turnover or the assets of organizations and stakeholders involved in the process;
- construction works, with a few exceptions, being acquired to support social and economic activities and, as such, forming inputs into broader projects, beyond the construction sector.

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Furthermore, the buyer-supplier relationship differs from non-construction works projects in that the buying or client function requires significant built environment professional capability throughout the process of conceptualization to implementation and maintenance, i.e. through the full life cycle of the project.

Construction works projects are delivered through a supply chain. Contracts bind the participants in the supply chain. The delivery of construction works projects embraces:

- a “buying” or client delivery management function focusing on client delivery management practices (plan, specify, procure and oversee delivery);
- a “supply” or delivery function focussing on the management and integration of the resources required to deliver the project.

The project management function associated with projects coordinates activities to direct, integrate and control the accomplishment of agreed objectives in support of the supply function. The delivery management function, on the other hand, focuses on knowledgeable leadership, consistent governance and systematic administration of procurement, contracts and project finances.

Client procurement and delivery management practices (the client buying functions) are central to the performance of the supply chain which delivers construction works projects. Such practices have a direct impact on the realization of the client’s value proposition for the project, i.e. the promise of measurable benefits. Delivery management is required to transform the value proposition associated with a business case into project outcomes. Accordingly, delivery management focuses on the client’s practices in delivering the client’s value aspirations for a construction works project whereas project management focuses on practices to accomplish agreed objectives. The ISO 10845 series focuses on the characteristics of procurement processes, methods and procedures and the detail relating thereto, concentrating on the evaluation and award phase of procurement. There are several options relating to how construction works are funded and how design and interface management responsibilities are allocated. There are also options relating to the different types of contracts that may be entered into during the delivery cycle of a project, how contractors and suppliers are to be remunerated, how secondary objectives are to be promoted through a contract and how the market is to be approached to solicit tender offers. Such choices impact upon project outcomes. ISO 22058 provides guidance on the development of procurement strategy and the procurement tactics which are necessary to effectively implement a procurement strategy.

This document focuses on delivery management and is of particular relevance to clients that engage regularly in the delivery of construction projects. It provides guidance on the client organization’s function to plan, specify, procure and oversee the delivery of construction works projects, enabling the business case to be converted into project outcomes. A client can be a project owner or an entity within a supply chain which contracts for goods and services or any combination thereof. This document applies primarily to clients who have a continuous flow, or pipeline, of projects. Nevertheless, much of the guidance can be adapted for use by occasional clients who have construction works projects delivered through trusted delivery teams.

[Annex A](#) describes the core systems associated with the delivery of construction works projects, namely a planning and budgeting system, an asset management system, a delivery management system and a procurement system. It also indicates the forward and backward linkages between such systems. [Annex B](#) provides a control framework which enables project delivery risks to be appropriately and proactively managed and renders the project delivery system capable of being audited. [Annex C](#) provides guidance on the specifying of requirements.

Construction project governance — Guidance on delivery management

1 Scope

This document provides guidance on:

- a) the role of the client in the effective and efficient delivery of construction projects;
- b) delivery management practices which enable the client's business case to be transformed into project outcomes in a manner which consistently realizes value for money.

This document is applicable to private sector, public sector or community organizations.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

3.1 asset management plan

documented information that specifies the activities, resources, costs and timescales required for an individual asset, or a grouping of assets, to achieve the *organization's* (3.10) asset management objectives

Note 1 to entry: The grouping of assets may be by asset type, asset class, asset system or asset portfolio.

Note 2 to entry: An asset management plan is derived from the strategic asset management plan.

Note 3 to entry: An asset management plan may be contained in, or may be a subsidiary plan of, the strategic asset management plan.

[SOURCE: ISO 55000:2024, 3.2.5, modified — The abbreviated term "AMP" has been removed.]

3.2 brief

document that states the requirements for a project

[SOURCE: ISO 6707-2:2017, 3.2.18, modified — The US preferred term has been removed.]

3.3 business case

documented justification to support decision making about the commitment to a project

Note 1 to entry: A business case summarizes the scope, benefits, costs and *risks* (3.20) of a proposed solution to a business need.

[SOURCE: ISO 21500:2021, 3.2, modified — "programme or portfolio" at the end of the definition has been removed; note 1 to entry has been added.]

**3.4
client**

person or *organization* (3.10) initiating and financing a project and approving the *brief* (3.2)

[SOURCE: ISO 6707-2:2017, 3.8.2]

**3.5
client delivery management team**

individuals or entities who, through coordinated actions, are responsible for performing the *delivery management* (3.8) functions associated with *project delivery* (3.15)

**3.6
construction works**

everything that is constructed or results from construction operations

[SOURCE: ISO 6707-1:2020, 3.1.1.1, modified — The US preferred term and notes to entry have been removed.]

**3.7
contractor**

person or *organization* (3.10) that undertakes *construction work* in accordance with a contract

[SOURCE: ISO 6707-2:2017, 3.8.6, modified — The US preferred term has been removed.]

**3.8
delivery management**

critical leadership role played by a knowledgeable *client* (3.4) to plan, specify, procure and oversee the delivery of *construction works* (3.6) projects including knowledgeable leadership, consistent governance and systematic administration of *procurement* (3.12), contracts and project finances

**3.9
feasibility study**

evaluation of a proposed *project*, the practicability of its achievement, potential *risks* (3.20) and the design, financial, economic, social and environmental implications

[SOURCE: ISO 6707-2:2017, 3.3.16, modified — "potential risks" has been added.]

**3.10
organization**

person or group of people that has its own function with responsibilities, authorities and relationships to achieve its objectives

[SOURCE: ISO 55000:2024, 3.3.1, modified — Notes 1 and 2 to entry have been removed.]

**3.11
performance**

ability to fulfil required functions under intended use conditions, behaviour when in use or impact on economic conditions, the environment, society or quality of life

**3.12
procurement**

process which creates, manages and fulfils contracts relating to the provision of goods, services and *construction works* (3.6) or disposals, or any combination thereof

[SOURCE: ISO 6707-2:2017, 3.5.18]

3.13

procurement document

documentation used to initiate or conclude (or both) a contract

[SOURCE: ISO 10845-1:2020, 3.25]

3.14

production information

information which provides the detailing, *performance* (3.11) definition, specification, sizing and positioning of all systems and components enabling either construction or the production of further information for construction

3.15

project delivery

combination of all planning, technical, administrative and managerial actions and activities associated with the construction, supply, refurbishment, rehabilitation, alteration, maintenance or disposal of *construction works* (3.6)

3.16

project delivery team

individuals or entities who, through coordinated activities, are collectively responsible for producing project deliverables

3.17

project delivery management plan

plan which, as a minimum, summarizes the *asset management plan* (3.1), provides a credible forecast of current and net demand for *construction works* (3.6) or requirements for functionality and prioritizes projects against a forecasted budget over a number of years

3.18

project management

coordinated activities to direct and control the accomplishment of agreed objectives

[SOURCE: ISO 21502:2020, 3.24]

3.19

project value

outcome of *client* (3.4) decision making to achieve an optimal balance of the project benefits, *risks* (3.20) and costs

3.20

risk

effect of uncertainty on objectives

Note 1 to entry: An effect is a deviation from the expected. It can be positive, negative or both, and can address, create or result in opportunities and threats.

Note 2 to entry: Objectives can have different aspects and categories and can be applied at different levels.

Note 3 to entry: Risk is usually expressed in terms of risk sources, potential events, their consequences and their likelihood.

[SOURCE: ISO 31000:2018, 3.1]

3.21

scope of work

document that specifies and describes the goods, services, or *construction works* (3.6) which are to be provided, and any other requirements and constraints relating to the manner in which the contract work is to be performed

Note 1 to entry: The term “scope of work” is a generic term that may be used to describe that which is commonly referred to in forms of contract and publications as

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- a) supply contract: scope, goods information or specifications
- b) service contract: scope, services information, specifications, scope of services, terms of reference or technical specification
- c) construction contracts: works information, *production information* (3.14), specifications, project specifications, *performance* (3.11) requirements, specification of work or scope.

Note 2 to entry: The term “scope of work” is also sufficiently broad to include design and *procurement* (3.12) requirements in design and construct, develop and construct and management contracting strategies relating to construction contracts (see ISO 10845-2 and ISO 22058).

[SOURCE: ISO 10845-1:2020, 3.29, modified — In note 2 to entry, the reference to ISO 22058 had been added.]

3.22

stakeholder

person, group or *organization* (3.10) that has interests in, or can affect, be affected by, or perceive itself to be affected by, any aspect of the project

[SOURCE: ISO 21500:2021, 3.18, modified — “programme or portfolio” at the end of the definition has been removed.]

3.23

sustainable development

development that meets the environmental, social and economic needs of the present without compromising the ability of future generations to meet their own needs

[SOURCE: ISO Guide 82:2019, 3.2, modified — Note 1 to entry has been removed.]

3.24

value for money

optimal use of resources to achieve intended project outcomes

Note 1 to entry: Optimal use of resources results in the most desirable possible outcomes given expressed or implied restrictions or constraints.

[SOURCE: ISO 10845-1:2020, 3.40, modified — “project” has been added.]

3.25

value proposition

promise of measurable benefits

Note 1 to entry: The *client's* (3.4) *business case* (3.3), vision, values and project priorities collectively make up the client's value proposition for a project

4 Delivery management concepts

4.1 Fundamentals of construction works projects

Construction works result from the management and integration of five primary resources, namely finance, people, materials, plant and equipment. Such works are delivered through a supply chain which is procured, mobilized and directed to provide the necessary professional services, labour and equipment, materials, products, components, assemblies and plant required to provide the works.

Contracts bind the participants in the supply chain (professionals, general contractors, suppliers of materials or equipment, suppliers, manufacturers, fabricators, service providers, subcontractors, etc.) and define the obligations, liabilities and risks that link the parties together. Direct contracts can be entered into with consultants, service providers, suppliers and contractors who, in turn, may subcontract some of their responsibilities under their contracts to subcontractors. The client's packaging strategy is a component of a procurement strategy that focuses on the organization of work into contracts or orders issued in terms of a framework agreement. This modifies the number of contractual relationships which the client must put in place, oversee and administer (see ISO 22058).

Subcontracting is a well-established practice in the construction industry. It is an effective means of involving small, medium and micro enterprises in the supply chain for the delivery of construction works. The contractor provides the overall planning for the project, coordinates the multiple interfaces between the sub-contractors and, unless otherwise stated in the contract with the client, remains responsible for providing the works as if the work had not been subcontracted. Subcontractors in turn manage their own work on site and off site.

4.2 The delivery process

4.2.1 Overview

Construction works projects are necessary to support organizational strategic objectives according to an organization’s purpose and values. The client’s business case, vision, values and project priorities collectively make up the client’s value proposition for a project. A client should to provide effective leadership of the project throughout the delivery cycle, commencing at a strategic level and ending at the close out of a project. A client must also:

- obtain the necessary resources which primarily relate to finance, people, materials, plant and equipment, to deliver the project;
- contract and mobilize a supply chain (linked set of resources and processes) to provide the necessary professional services, labour and equipment and to manufacture or supply materials, products, components, assemblies and plant;
- make executive decisions to enable project delivery outcomes which realize benefits for not only the organization but also for internal or external stakeholders.

Figure 1 illustrates the process whereby a client’s value proposition is transformed into project delivery outcomes (see ISO 22058). Project outcomes result in construction works projects with the required functionality, performance, and quality in all its forms, ready for use, with a concomitant impact on the three aspects of sustainability (economic, environmental and social; see ISO 21931-1 and ISO 21931-2). Project value, on the other hand, is the outcome of client decision making to achieve an optimal balance of the project benefits, risks and costs.

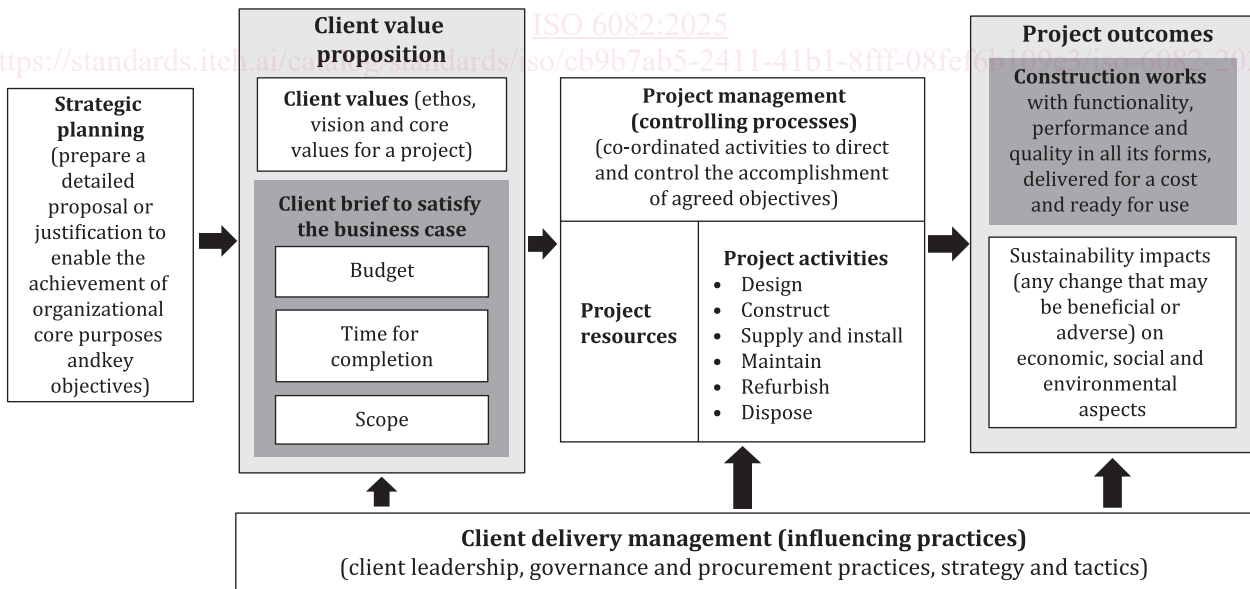


Figure 1 — Translating the client value proposition into project outcomes

4.2.2 Organizational governance practices

Each organization has its own functions with responsibilities, authorities and relationships to achieve its objectives and a governing body which has ultimate accountability for the whole organization. Organizations are guided by governance frameworks (strategies, policies, decision-making structures and accountabilities through which the organization's governance arrangements operate), which ensure that the organization remains true to its purpose (see ISO 37000).

Project delivery is necessary to support the strategic and business objectives of client organizations according to their purpose and values and must be delivered within the client's organizational governance framework. Client organizational governing bodies should hold management to account to ensure that construction works projects embrace the culture, norms and practices of the organization and align with its purpose. They should make decisions informed by credible information and reliable data, anticipated operational costs, stakeholders, ethical and societal expectations, compliance obligations, open and honest reporting and natural environment limitations and impacts (see ISO 37000).

4.2.3 Controlling practices

The purpose of controlling a project is to monitor and measure performance against an agreed plan, including authorized changes, taking account of the following when doing so (see ISO 21502):

- the business need is frequently satisfied through multiple contracts which should be procured and managed in such a way that the anticipated benefits are progressively realized;
- there are several interfaces and interdependencies between contracts where delays in or failure to put in place one contract or timeously complete a contract or a part thereof has a knock-on effect which not only delays project completion but can significantly increase project costs;
- demand is most often determined and managed through service life plans which are based on an assessment of current performance against desired levels of service or functionality and asset management plans which provide a credible forecast of current demand and net demand for services or requirements for functionality over a period of time;
- demand should be proactively managed through the planning, evaluation and award and contract management phases to prevent scope creep, i.e. changes, continuous or uncontrolled growth in a project's scope, at any point after the project commences;
- a range of different combinations of goods and services with differing characteristics such as initial cost, reliability, life-cycle costs, and operating costs can satisfy user requirements;
- risks are high due to uncertainties at the time when the contract is concluded;
- a supply chain frequently must be contracted, mobilized, and overseen to provide the necessary professional services, materials, products, components and assemblies, equipment and labour to fulfil the requirements of contracts;
- the final or outturn contract price equates to:
 - the sum of the initial contract price for work, which is known;
 - the cost of changes in scope of contract (variations) to enhance quality performance or to address shortcomings which can impair performance;
 - the amount of contract price adjustment for inflation provided for in the contract;
 - the cost of risk events that materialize in the execution of a contract for which the supplier or contractor is not responsible (see ISO 10845-1:2020, Annex E).