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Asset management - Overview, principles and terminology

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Gestion d'actifs - Aperçu général, principes et terminologie

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03.100.10	Nabava. Dobava. Logistika	Purchasing. Procurement. Logistics

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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 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 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 251, *Asset management*.

This second edition of ISO 55000 cancels and replaces ISO 55000:2014, which has been technically revised.

The main changes compared to ISO 55000:2014 are as follows:

- The document is restructured to align with the message it intends to convey; providing insight in understanding asset management and its principles, its benefits, the development of an asset management system, the relation between the two and the assets of an organization, and the different levels of maturity.
- The principles of asset management are evolved and extended.
- The benefits are rephrased and extended.
- The explanation of the elements of an asset management system are removed.
- Maturity of an asset management organization is introduced.
- The annexes are replaced by one Annex A, explaining asset management and its relationship with the asset management system.

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

0.1. Purpose

The purpose of this document is to describe asset management as the coordinated activity of organizations to realize value from and through assets and to introduce the asset management system.

This document gives the context for the set of asset management standards produced by ISO/TC251.

0.2. Relationship with other standards

ISO 55001 defines requirements for an asset management system. ISO 55002 provides guidance on the design and operation of an asset management system. ISO 55001, ISO 55002 and this document can be used in combination with relevant sector or specific asset type-specific standards and technical specifications to achieve the objectives of asset management.

Other standards in the set of asset management standards produced by ISO/TC251 can be used in the context established by ISO 55001, ISO 55002, and this document.

0.3. Target audience

This document is primarily intended for use by:

- top management who wish to adopt asset management and implement an asset management system in their organization;
- those involved in asset management or intending to become practitioners or auditors;
- anyone who wishes to learn more about asset management.

0.4. Further information about ISO/TC 251 and on asset management

ISO/TC 251 is an international technical committee made up of cross-sector experts that created the current standards and work today to continue improvements for the future. Delegations from more than 35 national standardization bodies contributed to the standards and many stakeholders from various asset management institutes, councils, and associations continue to participate today.

ISO/TC 251 maintains a website that provides additional information about asset management and on the products it produces. This can be found at: <https://committee.iso.org/home/tc251>.

Asset management — Overview, Principles and Terminology

1. Scope

This document provides an overview of:

- asset management, its principles and terminology;
- benefits from asset management;
- the asset management system;
- the relationship between asset management the asset management system and assets;
- asset management improvement and maturity.

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

NOTE 1 This document does not provide financial, accounting or technical guidance for managing specific asset types.

NOTE 2 Throughout the set of asset management standards produced by ISO/TC251, the term “asset management system” means a management system for asset management (rather than a management system for assets).

2. Normative reference

There are no normative references for this document.

3. Overview of asset management

3.1. Introduction

Asset management is the coordinated activity of an organization to realize value from its assets; and an asset is an item, thing or entity that has value, or potential value, to that organization.

Asset management applies across the entire organization at all levels and across all departments. Asset management is a multi-disciplinary activity and everyone in the organization and its supply chain should have some understanding of the organization’s purpose, objectives, and the value it seeks.

Long-lived assets may span multiple changes in organizational leadership. So, the realization of value requires a long-term view and continuity of stewardship, in line with organizational objectives. A long-term view allows the organization to decide what assets cost and deliver, in the context of the strategic view derived from organizational objectives.

Effective asset management provides assurance for the achievement of organizational objectives and realization of organizational sustainability through value preservation and value creation from investing in, utilizing, caring for, and disposal of assets. Key benefits are described in Clause 4.

3.2. Principles

Principles represent a basic belief, theory or rule that has a major influence on the way something is done. The following principles, taken together, are a foundation for understanding and implementing asset management. These asset management principles are enablers and drivers of asset management.

Principles help understand the purposes of asset management system (AMS) requirements, enabling them to be applied more effectively, but they should not be confused with those requirements. Principles are broader in nature and embody the philosophy underpinning asset management, and are not intended for audit or certification of their implementation.

ISO 55001 specifies auditable requirements for an AMS, based on a model for a management system that assures asset management is implemented effectively. The AMS requirements in ISO 55001 are complementary to the principles detailed in this document.

Asset management aims to integrate contributions from stakeholders. The following principles should be taken as a whole, and applied through implementation of the organization’s AMS.

The seven principles of asset management are:

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Principle 1 – Value

Principle 2 – Alignment

Principle 3 – Integration

Principle 4 – Leadership

Principle 5 – Adaptability

Principle 6 – Sustainability

- a) **Principle 7 – Governance****Value:** Assets exist to provide value for the organization and its stakeholders. Asset management does not focus on the asset itself, but on the value the asset can provide to the organization.
- b) **Alignment:** Vertical alignment enables the linkage between organizational purpose, objectives, plans and activities. Horizontal alignment enables the linkage between departments, professions and specialists. Together, they ensure a shared and complementary approach to the delivery of value.
- c) **Integration:** An integrated approach to organizational functions, processes, and management systems accelerates the benefits to be realized from asset management and reduces the time, effort and expenses involved in creating and maintaining an AMS.
- d) **Leadership:** Leadership and commitment from all managerial levels are essential for successfully establishing, operating and improving asset management within the organization. Effective leadership develops the organization's culture at every level.
- e) **Adaptability:** Responsive organizations are successful in the long-term and continue to be relevant when they have the ability to adapt to change and being alert to the context.
- f) **Sustainability:** Asset management considers sustainability (see 8.3.29) in relation to the delivery of objectives, including a sustainable view across the asset life. Asset management stimulates long-term thinking in the establishment of objectives and strategy and in day-to-day decision-making. Asset management takes account of future impacts, risks, uncertainties, and value realization opportunities for organizations and for current and future stakeholders (see 8.3.3).
- g) **Governance:** A mechanism that provides assurance through organizational oversight that asset management, AMS and assets consistently realize value over the long-term.

4. Benefits of asset management

Asset management enables an organization to realize value from assets in the achievement of its organizational objectives. What constitutes value will depend on these objectives, the nature and purpose of the organization, the services or products delivered and the needs and expectations of its stakeholders. Asset management supports the realization of value through consideration of, for instance, financial, environmental and social factors, risks, opportunities, 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 without sacrificing the short or long-term realization of organizational objectives;
- b) **informed asset decisions:** enabling the organization to improve and justify its decision-making;
- c) **managed risk and opportunity:** systematically identifying, evaluating, and controlling risks and opportunities, financial outcomes, asset and service resilience, health and safety, minimizing environmental and social impact;
- d) **improved products and services:** assuring the performance of assets leads to improved products

and services that consistently meet the expectations of customers and other stakeholders;

- e) **demonstrated social and environmental responsibility:** improving the organization's ability to adopt policies and activities that promote the well-being of society and the environment while lessening negative impacts on them, for example, reduction of carbon emissions, conservation of resources and adaptation to climate change;
- f) **demonstrated compliance:** transparently conforming with legal, statutory and regulatory requirements, as well as adhering to asset management standards, policies, processes and procedures, can enable demonstration of compliance;
- g) **enhanced reputation:** improving customer satisfaction, increasing stakeholder confidence and demonstrating responsible stewardship of funds;
- h) **improved organizational sustainability:** effectively managing short and long-term effects, expenditures and performance, thus improving the sustainability of operations and the organization;
- i) **improved efficiency and effectiveness:** developing, reviewing and improving processes, procedures and asset performance thus improving efficiency and effectiveness (such as a more effective use of resources, better teamwork and employee effectiveness), and the achievement of organizational objectives;
- j) **improved co-ordination and communication:** increasing working together, understanding, developing a supportive culture and aligning across all areas of the organization, including support functions and supply chain;
- k) **increased value from technology and innovation:** increasing the beneficial use of technology and innovation supporting the achievement of objectives.

5. Management system(s) and integration

5.1. Management systems

A management system is defined by ISO as “a set of interrelated or interacting elements of an organization to establish policies and objectives, as well as processes to achieve those objectives” (see 8.3.5). Organizations employ a management system to achieve their objectives. This management system can be organized into parts and be informal in small organizations, and structured and formalized in large or complex organizations.

The AMS is a set of interrelated or interacting elements of an organization to establish policies and objectives, as well as processes to achieve those objectives for asset management. The AMS requires the organization to define the assets within its scope. The scope is based on factors such as the organization's AMS capabilities or the contribution of assets to its objectives. The appropriate scope can evolve over time or during the implementation of the AMS.

AMS elements include: the context of the organization, leadership, planning, support, operation, performance evaluation and improvement (see 8.3.5 and 8.3.6). The AMS should be influenced by the asset management principles (see 3.2), leadership and culture to positively impact motivation and behavior, as well as support.

Requirements for an AMS are defined in ISO 55001. These requirements are used to evaluate an organization's AMS capabilities and may be used as a basis for audit or external certification of an organization's AMS.

5.2. Integrating the organization's management systems

Organizations apply management systems to many areas of their activities. There are more than 40