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Obvladovanje premoženja - Sistemi vodenja - Smernice za uporabo ISO 55001

Asset management - Management systems - Guidelines for the application of ISO 55001

Gestion d'actifs - Systèmes de management - Lignes directrices relatives à l'application de l'ISO 55001

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03.100.70	Sistemi vodenja	Management systems

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ISO/DIS 55002

Asset management — Management systems — Guidelines for the application of ISO 55001

Gestion d'actifs — Systèmes de management — Lignes directrices relatives à l'application de l'ISO 55001

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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).

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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.

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This document was prepared by Technical Committee ISO/TC 251, *Asset management*.

This third edition cancels and replaces the second edition (ISO 55002:2018,) which has been technically revised to align with ISO 55000:2024 and ISO 55001:2024 and to update and improve the guidance on the implementation and application of an asset management system.

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The main changes are as follows:

— alignment with ISO 55000:2024 and ISO 55001:2024, including revised terminology, asset management principles and outcomes;

— expanded guidance on asset management decision making, including the decision-making framework, value and decision criteria;

— revised and expanded guidance on the SAMP, AMPs, asset management system scope and the alignment of strategic and operational asset management planning;

— expanded guidance on risks and opportunities, management of change, life cycle management and externally provided processes, products, technologies and services;

— revised guidance on supporting capabilities and performance, including data and information, knowledge, competence, performance evaluation, continual improvement and predictive actions;

— reorganization and revision of the informative annexes, together with additional guidance addressing climate change, sustainability, resilience and developments in digital technology.

A list of all parts in the ISO 55000 series can be found on the ISO website.

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

General

This document provides guidance for the application of a management system for asset management, referred to as an "asset management system", in accordance with the requirements of ISO 55001:2024.

This document provides explanatory text intended to clarify the requirements specified in ISO 55001 and provides examples to support implementation of these requirements. It does not provide guidance for managing specific asset types.

In general, this document follows a similar structure and sequence of clauses and subclauses as in ISO 55001. Throughout this document distinction is made, where relevant, between assets and asset portfolio, asset management and the asset management system. The relationship between these three concepts is clarified In ISO 55000. When applying ISO 55001, it is relevant to be aware of this relationship.

This document provides guidance for use by:

— those involved in the establishment, implementation, operation, maintenance and improvement of an asset management system

— those involved in delivering asset management activities, including service providers.

General information on asset management, and information on the terminology applicable to this document, is provided in ISO 55000.

Assets, asset management and asset management system

An asset is something that has potential or actual value to an organization. Asset management enables an organization to realize value from and through assets in the achievement of its organizational objectives. An asset management system is used by the organization to direct, coordinate and control asset management activities to realize value from and through its assets for the organization and for its stakeholders.

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NOTE An asset management system can be established by any organization, which can be a sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private. The organization, for example, can be an asset owner, custodian, operator, service provider, subsidiary, alliance or joint venture.

The asset management system, asset management and the asset portfolio should be aligned to, and support delivery of, the organizational objectives and the organizational plan.

Organizational objectives are generally developed as part of the organization's strategic level planning activities and are given in documented information within an organizational plan. The organizational objectives form a key part of the context of the asset management system and are the starting point for establishing the asset management objectives.

Understanding the context of the organization enables the organization to design, implement and maintain its asset management system, asset management and the assets, in alignment with the purpose of the organization, its objectives and its stakeholder needs and requirements.

The asset management system includes:

a) the asset management policy (see clause 5.2),

b) the asset management objectives (see clause 6.2),

c) the strategic asset management plan (SAMP, see clause 6.2.1),

d) the asset management plan(s) (see clause 6.2.3),

e) supporting activities (see clause 7),

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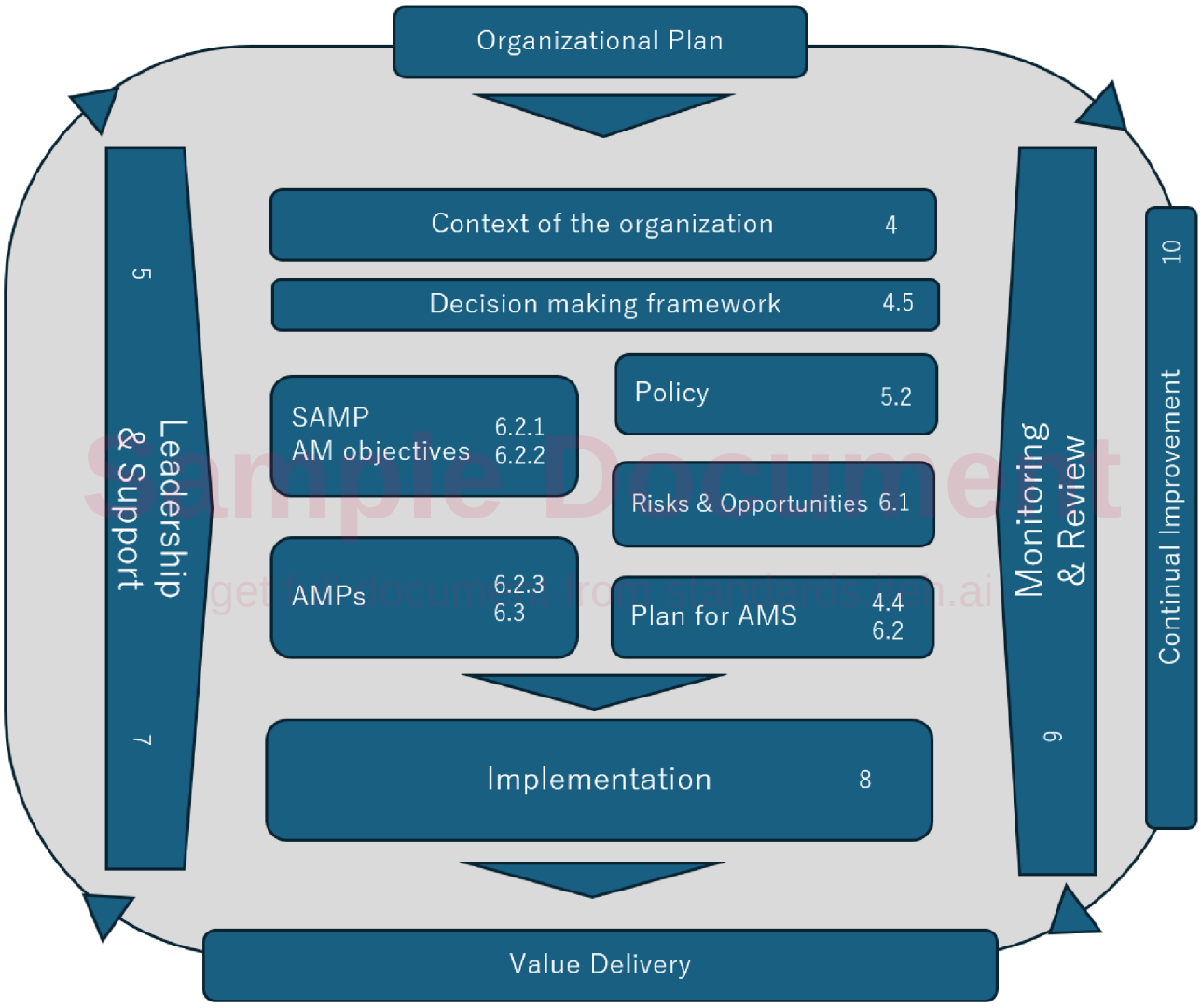
f) operational planning and control (see clause 8), including the processes and procedures employed to manage assets in the asset portfolio throughout their life cycle,

g) performance evaluation (see clause 9),

h) improvement activities (see clause 10),

i) guidance on how it relates to or interfaces with other relevant policies and processes and management systems (see clause 4.3.2).

Figure 1 shows the relationship between the key elements of an asset management system, together with the related clause numbers of the ISO55001



NOTE 1 Only the primary connections are shown to avoid over-complexity

NOTE 2 This figure does not aim to repeat the distinction between asset management and an asset management system: it is a connections view showing directions of influence

NOTE 3 The grey box with the PCDA arrows designates the boundary of the asset management system and highlights the importance of continual improvement.

Figure 1 — Relationship between key elements of an asset management system

Scope of this document

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This document provides guidance on the implementation of the requirements for an asset management system specified within ISO 55001 clauses covering the overall approach of comprehensive asset management. It also addresses several subjects that are linked to several clauses.

In the design and improvement of the asset management system and execution of asset management, four pathways are of key importance:

— alignment from context of the organization to asset management policy to the SAMP to asset management plans to operation

— objectives, derived from the organizational objectives through strategic asset management objectives, to asset management objectives; these are often translated into a hierarchy of key performance indicator

— decision-making criteria and decision-making processes that are part of the decision-making framework

— risk management which is developed at all levels, from the top level in the organization down to daily operations; the risk management framework is aligned with the design and improvement of the asset management system and the risk management process with the asset management execution

The concurrence of these four pathways is one of the key aspects of asset management. In particular, the alignment of decision making and setting of objectives is not straightforward. These are developed together and can need several iterations before they are fully aligned and mature.

Expressions of provisions

In this document, the following verb forms are used:

— “should” indicates a recommendation that has major impact on achievement of requirements

— “may” indicates a permission that has no direct impact but may represent improvement potential

— “can” indicates a possibility or a capability

Information marked as “NOTE” is for guidance in understanding or clarifying the associated text.

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Asset management — Management systems — Guidelines for the application of ISO 55001

1 Scope

This document gives guidelines for the application of an asset management system, in accordance with the requirements of ISO 55001.

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; however, in Annex C information is provided on the relationship between financial and non-financial asset management functions.

NOTE 2 For the purposes of ISO 55000, ISO 55001 and this document, the term “asset management system” is used to refer to a management system for asset management.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes It's mark that we delete which words are and closet I I would I mean I would I prefer the old words it's going to be using this one it would be how the nature how the nature of course is andcument. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

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ISO 55000:2024, *Asset management — Vocabulary, overview and principles*

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ISO 55001:2024, *Asset management — Asset management system — Requirements*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 55000:2024 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 Definitions

3.1.1
criticality
Degree to which an asset, asset system and asset portfolio function has the potential to impact on the organization’s objectives, performance and decision making.

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3.1.2
decision-making criteria
Measures of value that are used to compare and select an option when considering the relevant factors influencing a decision.

Note 1 to entry: Examples of decision-making criteria may include benefit/cost ratio; return on investment; profitability index; reliability metrics; combined weighted score; risk tolerance; regulatory compliance; reputational impact; cultural historical value; social, health, safety and environmental impacts; net present value (NPV) of all positive and negative cash flows; group opinion (consensus).

3.1.3
decision-making framework (DMF)
Framework for making asset management decisions

Note 1 to entry: A DMF will typically include standards, principles, processes, rules and *decision-making criteria* (clause 3.1.2)

4 Context of the organization

4.1 Understanding the organization and its context

4.1.1 General

When establishing or reviewing an asset management system, it is important to ensure that its design, scope and implementation are consistent and aligned with the external and internal context of the organization.

Although the principles of asset management as described in ISO 55000 have been well embedded in ISO 55001, fulfilment of the requirements in ISO 55001 will not alone guarantee the intended outcomes of asset management. The realization of value and the achievement of organizational objectives is a conscious choice of the organization when implementing the requirements for the asset management system (See ISO 55000:2024 clause 4.3). Meeting all ISO 55001 requirements is often viewed as a starting point for further improvement. Over time, the asset management system will progressively help achieve organizational objectives and realize value from assets, while providing better oversight, accountability, and adaptation to changing internal and external context over the life cycle of assets and the asset management system.

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The awareness of the interdependencies between external and internal contexts is necessary to understand the impact on the organization.

NOTE “values” refers to the principles that guide an organization’s internal and external conduct

NOTE “stakeholder” can also be referred to as an “interested party”.

4.1.2 External context

Understanding the organization’s external context can include, but is not limited to, consideration of the following:

a) sustainability, resilience, social and cultural, political, legal, regulatory, financial, technological, economic, competition, and natural environment impacts and events, whether international, national, regional or local;

b) key drivers and trends in factors that are identified as potentially having an impact on the objectives of the organization (for example cyber threats, use of AI, market forces);

c) relationships with perceptions and values of external stakeholders.

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4.1.3 Internal context

Understanding the organization's internal context can include, but is not limited to, consideration of the following:

a) governance requirements;

b) policies, objectives, and the strategies that are in place to achieve them;

c) the organization's culture and values;

d) organizational structure, roles, accountabilities and authorities;

e) the size and complexity of the organization;

f) capabilities, understood in terms of resources and knowledge (e.g. capital, time, people, systems and technologies);

g) individual or organizational biases (e.g. a person with a strong agenda for a specific outcome or an organizational culture that distorts management and data-driven decision making);

h) information systems and information flows;

i) asset decision making in the organization (both formal and informal);

j) standards, guidelines and models adopted by the organization;

k) relationships with, and perceptions and values of, internal stakeholders;

l) the form and extent of contractual relationships;

m) the organization's risk management plans including tolerance limits, risk attitude and capacity;

n) the maturity of asset management and other management systems, plans, processes and procedures;

o) integrity and performance of the assets and asset systems, and the outputs of consequent evaluations or reviews;

p) the size, complexity and criticality of the assets;

q) feedback from the investigation of previous asset and asset system failures, incidents, accidents and emergencies, and any systemic or statistical analyses and evaluations;

r) assessments of the ability of the asset management system to achieve the intended results of the organizational objectives;

s) feedback from previous self-assessments, internal audits, third party and certification reviews;

t) competence of staff, asset managers, internal auditors and top management impacting the area of asset management.

At the strategic level, tools such as Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis and Political, Economic, Social, Technological, Legal, Environmental (PESTLE) analysis may be used for identification and evaluation of contextual issues. A simpler approach, such as brainstorming, can be useful for organizations, depending on the size and complexity of their operations.

The processes and outputs of processes used for evaluating the organization's context are considered necessary for the effectiveness of the asset management system, and may, therefore, be maintained as documented information (see ISO 55001, clause 7.5). The triggers and review frequency for conducting these processes should also be defined in documented information.

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