Upravljanje objektov - Navodilo za strateško nabavo in pripravo dogovorov (ISO/DIS 41012:2026)

Facility management - Guidance on strategic sourcing and the development of agreements (ISO/DIS 41012:2026)

Facility-Management - Leitfaden zur strategischen Beschaffung und der Entwicklung von Vereinbarungen (ISO/DIS 41012:2026)

Facility management - Recommandations relatives au processus d'approvisionnement stratégique et d'élaboration des accords (ISO/DIS 41012:2026)

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Facility management — Recommandations relatives au processus d'approvisionnement stratégique et d'élaboration des accords

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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.4

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 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 the following URL: www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 267, *Facility management*

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Introduction

The International Standards on facility management (FM) developed by ISO/TC 267 describe the characteristics of facility management and are intended for use in both the private and public sectors.

NOTE   The terms "facility management" and "facilities management" can be used interchangeably.

International cooperation in the preparation of these International Standards has identified common practices that can be applied across a wide variety of market sectors, organizational types, process activities and geographies, and their implementation will help to:

— improve quality, productivity and financial performance;

— enhance sustainability and reduce negative environmental impact;

— develop functional and motivating work environments;

— maintain regulatory compliance and provide safe workplaces;

— optimize life cycle performance and costs;

— improve resilience and relevance;

— project an organization's identity and image more successfully.

FM and related goods and services support the achievement of core organizational activities and objectives. The purpose of this document is to enable organizations to identify and select the most appropriate resources for the design, sourcing and delivery of FM.

This document provides guidance on the overall strategic sourcing process and on how to prepare and implement adequate internal or external FM agreements. The Figure 1 below provides an overview of the logical sequence of this document.
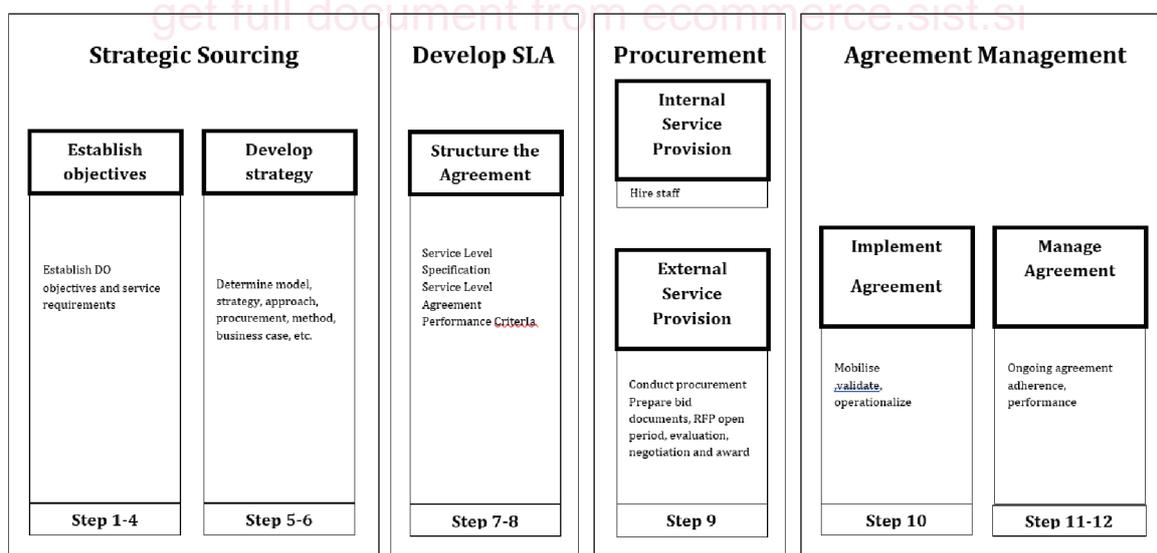
Figure 1 — ISO 41012 logical sequence

This document also provides guidance on:

— types of agreements;

— development, structure and contents of agreements;

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— clarification of definitions, where appropriate.

This document promotes a methodology from a strategic level to an operational level, with examples and check lists. The application of this sourcing approach is intended to contribute significantly to adding value and optimizing costs of operations for FM professionals and procurement, finance and senior management teams.

Annexes A and B give examples of requirements for typical services and a business case. Annexes C and D provide general and specific clauses and structured checklists for typical agreements. These annexes facilitate the selection of important clauses and preferences in the development of agreements, which allow for differences in origin, purpose and jurisdictions / national rules and regulations, and are based on a generic platform.

This document covers general demand organization requirements and the FM should apply this standard within their own context. Not all information in this document will be applicable to every FM process or agreement.

In this document, references to "agreement", "service" or "service provider" are specific to FM and facility services agreement, facility service or facility service provider (internal or external). Any reference to a single service can also include multiple services.

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Facility management — Guidance on strategic sourcing and the development of agreements

1 Scope

This document provides guidance on sourcing and development of agreements in facility management (FM). It highlights:

— different sourcing strategies and considerations to determine the best for the demanding organization;

— essential elements in FM sourcing processes;

— FM roles and responsibilities in sourcing processes;

— development processes and structures of typical agreement models.

This document is applicable to:

— strategic processes related to service and support functions for the core business;

— development of FM strategies;

— development of facility service provision agreements covering both public and private service demand and internal and external production/delivery options;

— development of FM information systems;

— FM education and research;

— organization development and business re-engineering processes in major types of working environments (e.g. industrial, commercial, administration, military, healthcare, accommodation).

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 41011, *Facility management — Vocabulary*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 41011 and the following apply.

ISO and IEC maintain terminological 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
Strategic Sourcing
The process undertaken by the DO to come to a strategic decision about the nature of FM service delivery.

3.2
Key Performance Area
Core activity domains that contribute significantly to achieving strategic objectives.

4   Sourcing strategy and understanding the core business context

4.1   Sourcing strategy

Aligning the structures and delivery of FM and support services provision with the demand organization's business strategy is critical to successfully achieving core business objectives. It is important that the FM organization analyses the demand organization's strategy. An effective sourcing process is important to achieve that objective.

Criteria that can have an impact on sourcing strategy include, but are not limited to:

— the competitive environment;

— value drivers (including cost/benefit analysis);

— the need for resource flexibility;

— business risk;

— reliability of supply chain / risk of over-reliance on single suppliers;

— operational characteristics;

— operational interdependencies;

— availability of in-house FM expertise;

— the availability and capability of various supply options;

— corporate policies;

— Regulatory/legal compliance requirements;

— organizational culture and management style;

— reporting requirements and management information systems;

— DO objectives on a strategic and operational level;

— innovation;

— corporate and real estate strategy;

— FM strategy;

As most organizations live in an environment of dynamic change, these sourcing processes should be reviewed regularly and at all times be closely linked to the organization's overall business strategy.

It is vital that adequate FM competence is available within the demand organization (DO) to support the sourcing process through internal and/or external sources. These competences should include, but not be limited to:

— understand core business;

— analytic skills;

— management skills;

— communication skills;

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— appropriate knowledge of FM;

— procurement skills;

— understand the regulatory/legal compliance requirements;

— environmental, social and cultural awareness;

To ensure an optimum outcome through each state of the process, it is important to engage the appropriately competent expertise to ensure exposure to the broadest potential opportunities are made available also in the procurement phase of the process.

4.2 Sourcing Risk Assessment

Risk analysis is a process that is used to understand the nature, sources and causes of risk. A careful evaluation will ensure foreseeable risks are identified, quantified and, where possible eliminated. It is also used to study impacts and consequences. The level of detail and complexity applied to the review will depend upon the potential impact.

ISO 31000 defines risk as "the effect of uncertainty on objectives". Incorporating risk assessment and management into strategic sourcing and the development of agreements enables the demand organization and delivery organization(s) to incorporate and address potential threats and opportunities in a structured manner. In addition to identifying risks, it is important to assess probability, impact and consequence so that they can be incorporated into strategic planning, decision making and the overall strategic sourcing and agreement process.

The demand organization should consider potential risks during development of the sourcing strategy and modify as appropriate on the basis of improved knowledge during the procurement phase of the process, eventual supplier selection and negotiation and through ongoing governance. The level of detail and complexity applied to the risk assessment will depend upon risk complexity, probability, impact and potential consequence.

A key objective is to ensure that risk is allocated and apportioned to the organization best able to manage or mitigate each risk to a level acceptable to the demand organization.

Areas to consider during the risk assessment should be comprehensive enough to meet the needs of the demand organization and the service or activity being sourced. The assessment may include but not be limited to the following:

— Political Risk:

— Prevailing current and expected political climate to services being sourced

— Other political and regulatory risks that may impact ability to deliver

— Economic Risk:

— Economic climate

— Inflation and potential impact to agreement

— Market Risk:

— Supplier power and concentration

— Purchasing power

— Market practices

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— General competencies of suppliers for service being procured within the market

— Technology Risk:

    — Availability and maturity of technology to support delivery of service over life of agreement

    — Ownership of technology by supplier or demand organizasion

— Legal Risk:

    — Jurisdictional / Country legal risk

    — Maturity of contracting arrangements

    — Local familiarity with sourcing contract types, strategies and relationships

More specific risks for the demand organization to consider may include:

— Demand Organization Expertise

— Compliance risk

— Business Continuity

— Intellectual Property

— Reputational Risk

— Health & Safety

    — Ethics

    — Brand of Demand Organization and potential suppliers

    — Operational

    — Mutual dependency (share of demand organization spend and share of supplier revenue)

    — Transition risk from change in delivery from internal to third party or between third parties

    — Risks associated with the service or activity being sourced:

        — Portfolio data and/or assets

        — Quality of information on service to be sourced

        — Local service provider competencies

        — Safety or compliance implications for specific service

        — Impact of service on other Demand Organization operations

NOTE   For specific risk management information, see ISO 31000 and ISO 41014 Para. 4.4

The demand organization should consider the potential risk elements prior to implementing an agreement. All foreseeable risk elements should be considered to ensure the following (among other considerations):

— that the impact of needs are fully defined;

— translation of needs and constraints into requirement and specifications/service level, e.g.:

    — data on the property portfolio and/or built environment;

    — information on initial and long term cost implications;

    — competences in the demand organization;

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— competences by the service provider;

— resources;

— health, safety and environment;

— health & safety

— security;

— funding;

— IT system, hardware and communication technology/integration;

— due diligence;

— coordinated design, construction and transfer to usage;

— coordinated disaster recovery planning (natural and business related);

— business continuity planning and management;

— corporate governance;

Throughout a strategic sourcing process, several choices and decisions are made that can have impact on risks and opportunities in the project. A risk based approach to FM means that risk analysis needs to be repeated throughout the process of strategic sourcing as well as FM services at specific milestones, at a level appropriate for the relevant milestone.

4.3 Strategic, tactical and operational level

4.3.1 General

In order to succeed and deliver required results, FM should be in close synchronization with the mission, vision, objectives and domains of the core business. It is the role of FM to provide strategic guidance to a core business in relation to FM aspects, interpreting needs and demands, translating them into explicit service and deliverables requirements. FM acts on the main three levels:

— strategic;

— tactical;

— operational.

NOTE   "Strategic level", "tactical level" and "operational level" are defined in ISO 41011.

4.3.2 Strategic level

At the strategic level, the aim is to achieve the strategic objectives of the organization in the long term by means of:

— establish the FM strategy and sourcing strategy in accordance with the organization's strategy;

— policy-making, elaborating guidelines for space, built environments, processes and services;

— initiating risk analysis and mitigation and providing the direction to adapt to changes in the organization;

— establish performance management policy and outcomes;

— assessing the impact of facility on the primary activities, external environment and community;

— maintaining relations with authorities and other stakeholders;

— approving business plans and budgets;