



**Secretariat of ISO/TC 251
To the Members of
ISO/TC 251
Asset Management**

Date: 27 May 2021

**Communiqué on the 9th meeting of ISO/TC 251 Asset management,
Held by webinar on 19 May 2021**

ISO/TC 251 had held its 8th meeting in November 2019. Regrettably, due to the COVID 19 pandemic, a meeting planned for June 2020 was cancelled. Instead a reporting webinar was held in October 2020 to update members on progress with the TC's activities, and the May webinar was the first formal meeting of the TC since 2019.

The committee noted that the membership of the TC now stands at 34 P-members, 20 O-members and 31 Liaisons.

During 2020, two of the TC's key standards, ISO 55000 and ISO 55001 had undergone formal review processes. The results were examined at a meeting of the TC251 Chair's Advisory Group (CAG) held in March 2021, which made recommendations that the two standards should be revised. A subsequent ballot of the TC's members supported these recommendations.

The CAG meeting also reviewed the activities of the TC's Ad Hoc Groups (AHGs) and agreed that their work should now be taken forward into the revisions of the standards.

Due to concerns about the focus of the standard, the development of ISO 55011 by WG7 had previously been back-staged to the "Preliminary stage" in March 2020, in order to give the WG time to examine the concerns and to make proposals for resolving them. The meeting discussed the next steps in moving this work forward following excellent progress from WG7.

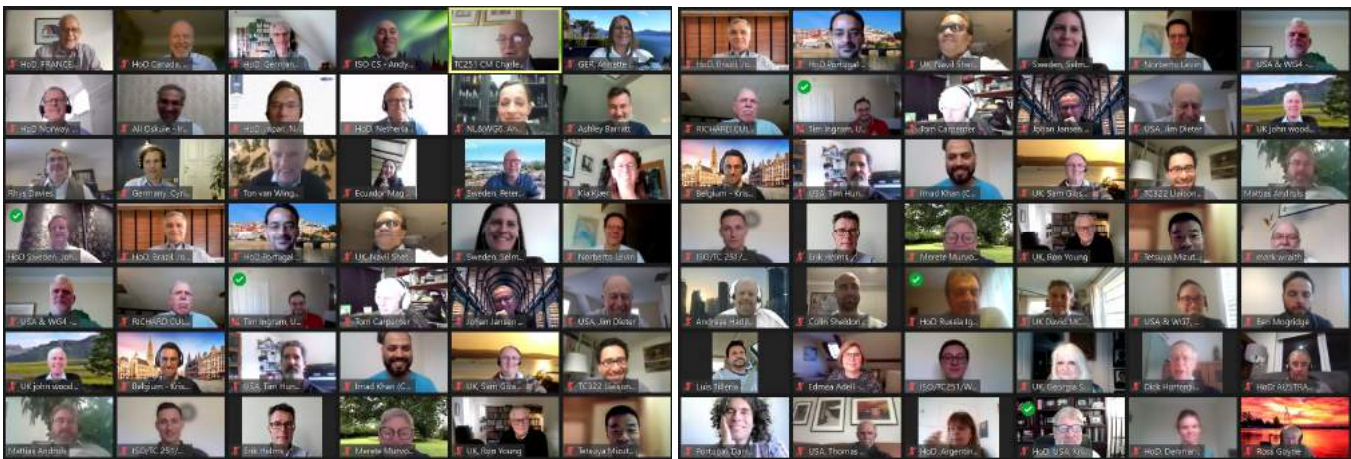
The TC was pleased to welcome
Ashley Barratt as its new Deputy Chair



Early in 2021, two new work item proposals had been received from China and had been approved by ballot. These concern the topics of "People involvement and competence" and "Data asset value evaluation index system". Dr Gao Ang was appointed to be the Convenor of a new Working Group, WG8, to lead the first project, and Mr Yang Xiao-feng to be the Convenor for another new WG9, to lead the second one.

During the plenary meeting:

- a) The TC251 Chair, Rhys Davies, reported that:
 - The CAG meeting had agreed that the revisions of ISO 55000 and ISO 55001 should be assigned to WG4 and WG6 respectively.
 - During the original development of ISO 55000 and ISO 55001, there had been a separate Ad Hoc Group looking at the financial aspects of asset management. As only limited outputs from that group had been incorporated into ISO 55000 and ISO 55001, this had led to the later development of ISO/TS 55010. WG5 should now assume the role of the "Finance" group during the revision of the standards and examine what aspects of ISO/TS 55010 could be migrated into them.



A sample of Delegates to the meeting

(not everyone had a camera or were visible when the Group photo was taken – apologies to those who aren't on here)

b) The Convenor of WG3 *Communications*, Boudewijn Neijens, reported that it had been working on:

- Managing the TC’s website (<https://committee.iso.org/home/tc251>)
- Finalizing its Communications Strategy
- Supporting active Mirror Committees
- Translations of the website materials (German translations have recently been added) and direct document links being added on translated web pages
- Newsletter #5
- Case study and a success story policy
- Assisting WG7 in promoting its Survey

In going forward, the WG intended:

- Completing its messaging slide decks
- Developing a Communication plan per audience
- Promoting the TC via social media, particularly by themes & dates
- Refining the “Known Certified Organization” process
- Reviewing/expanding the Sustainable Development Goals paper
- Increasing support to work with mirror committees
- Updating the Russian web content

In closing Mr Neijens made a plea for members to assist by providing additional case studies on the implementation of ISO 55001 systems, as these are well received and in demand from user of the website.

c) The Convenor of WG4 *Product Improvement and Preparing for a potential revision of ISO 55000*, Jack Dempsey, reported that it had continued its activities:

- in maintaining the TC’s Knowledge Base,
- in processing feedback, through establishing task groups to assist with surveys and to manage liaisons
- in improving facilitation of the TCs work, including the development of a template for Design Specifications, and through the processing of 3 new product improvement proposals
- by the development of a Design Specification for the revision of ISO 55000, which had since been approved by ballot

In going forward the WG would:

- maintain its Knowledge Base, feedback and facilitation activities, for which Jyrki Paavilainen, as Deputy Convenor, would take the lead.
- embark on the major task of revising ISO 55000, for which it would be pleased to receive additional experts to assist in the work
- be establishing a separate task group to focus on terminology issues, under the leadership of David Danes

It was agreed to rename the WG to *Product Improvement and Revision of ISO 55000*.

d) The Convenor of *WG5 Finance and asset management alignment*, Johan Paulsson reported that:

- It had been considering how best to progress the development of materials on Asset Registers
- It had agreed that the best path forward would be for a revision of ISO/TS 55010 to be initiated, to include a new annex on this topic

In going forward

- it would start the revision of the TS, once this is approved by a ballot of the TC's members
- it would actively engage with WG4 and WG6 to examine the aspects of ISO/TS 55010 that could be taken forward into the revisions of ISO 55000 and ISO 55001
- it would act as the focus point for the financial aspects of asset management

Mr Paulsson also noted the contribution of Ed Singer as Deputy Convenor to the work of the WG.

e) The Convenor of *WG6 Preparation for a revision of ISO 55001*, Martin Kerr, reported that:

- It had been actively engaged in the revision of ISO's Annex L, Appendices 2 & 3, "Harmonized structure" (HS) for management system standards, through the ISO/TMB/TAG13 Joint Technical Coordination Group (JTCG) and its Task Force (TF) 14. The revised HS was approved by ISO during 2020 and would be applied during the revision of ISO 55001.
- It had established several teams to examine a number of Themes on topics that will need to be considered during the revision of ISO 55001, and would be examining the results of that work
- It had developed a Design Specification for the revision, which had subsequently been approved by ballot

In going forward:

- It would be working on the revision of ISO 55001
- It would work actively with WG4 to ensure coordination with the revision of ISO 55000

Mr Kerr advised that he was pleased to note the appointment of Annemarie Kin as Deputy Convenor to the WG, to support the WG in its future activities.

It was agreed to rename the WG to *Revision of ISO 55001*.

e) The Convenor of *WG7 Development of ISO 55011*, Tiffany Batac, reported that:

- Following the back-staging of its work, it had decided that a key method for obtaining information on the purpose and audience for the standard would be to conduct a survey
- It had held an intense series of meetings to develop the survey questionnaire, before loading it onto an online platform to conduct the survey
- It was grateful for the assistance of WG3 in promoting the survey on the TC's website
- The survey had received over 110 responses from 20 different countries, as well as a number of respondents who had volunteered to participate in additional interviews
- It had used the results of the survey to develop a detailed Design Specification for the development of ISO 55011, which would now be subject to a ballot by the TC's members.

In going forward

- The WG considered that the work on the Design Specification had significantly clarified the direction for the future standard and achieved consensus amongst its members
- It looked forward to the Design Specification being approved and to the project being re-started and was planning its future activities in the expectation that this would occur.

Ms Batac thanked the WG's Deputy Convenor, Kerry Brown, for having managed the WG during her maternity leave (the members were pleased to congratulate Ms Batac on the arrival of her son Alexzander, and look forward to his future participation in the TC).

f) The Convenor of the *Spanish Translation Task Force*, Maria-Aurora Agullo, reported that:

- It had been active in translating all of the TC's published standards, the website's pages, and all of the website materials

In going forward, the STTF would continue to be active in providing translations, as and when the TC produced standards or new website materials.

The Chair thanked Ms Agullo for her report and the members of the STTF for their excellent work. He noted from the WG3 report that the most frequently visited pages on the website were now the Spanish language versions. This indicated that the greatest growth in the use of the TC's standards was now in the Spanish speaking countries, and the importance of providing such translations.

g) The Convenor of Ad Hoc Group 3 on *Guidance for investment and other asset management decision-making to optimize value when facing multiple criteria and competing goals*, Nuno Marques de Almeida, reported that:

- The original work of the AHG had been completed in June 2020 (under the convenorship of Annemarie Kin), when its report had been delivered to the TC (as document TC251/N662).
- The report had since been forwarded to WG6, where it had been used as the basis for the work on its Theme 1
- The report's recommendations had also been used by WG4 in the development of the Design Specification for the revision of ISO 55000.
- Owing to the establishment of ISO/TC 322 *Sustainable Finance*, and a project to develop ISO 14100 *Guidance on Environmental Criteria for Projects, Assets and Activities to Support the Development of Green Finance* by ISO/TC207/SC4, it had been agreed by the TC251/CAG to re-purpose the AHG to act as the focal point for the TC's liaisons to those activities. The liaisons had been managed by Tetsuo Yagi to TC322, and by Saidur Rahman and Dick Hortensius to ISO/TC207/SC 4, on behalf of the TC.

Noting the recommendation of the CAG to bring the work of the AHGs into the revisions of ISO 55000 and ISO 55001, Dr Almeida supported the recommendation that the AHG should now be closed, and the liaison functions transferred to WG4.

h) The Convenor of Ad Hoc Group 4 on *Information Management in decision making*, Shiv Iyer, reported that:

- In considering its remit, the AHG had refined this to <<Understand guidance related to the specification, collection, management and analysis of data supporting asset management decision-making in the larger context of organizational objectives>>
- It had recently completed its report which would be circulated to the TC's members (see document TC251/ N741).
- The ISO 55000 series of standards provide little guidance about **how** to organise/ manage data/ information for asset management. The approach to providing clear approaches and requirements could either be to expand the ISO 55000 series to include such content, or to identify whether other standards already provide such definition.
- Liaisons with e.g. ISO/TC184/SC4 (for the ISO 8000 series of standards on *Data Quality*), or ISO/TC59/SC13 (for the standards on *Buildings Information Modelling*, or BIM) should be maintained.

While noting the CAG recommendation to bring the work of the AHGs to a close, Dr Iyer, requested that AHG4 be allowed to continue for a further 6 months, in order to be able to provide related articles on data management for asset management to WG3 for publication on the website. This was agreed.

The TC agreed to hold a future plenary, via webinar, around November 2021, to receive reports on progress from its WGs. With potentially six projects about to start, as well as the need to coordinate the activities of the WGs, and in the expectation that physical meetings may be able to be held again during 2022, the TC would be pleased to receive offers from members to host such future meetings.


The TC noted with great sadness that Ton van Wingerden had advised that he needed to withdraw from the convenorship of WG6, due to changing work commitments within his organization. Ton has been a key member of the TC's leadership team since its establishment as a Project Committee in 2010, and served as the Convenor of WG2 for the initial development of ISO 55001 and ISO 55002, followed by leading WG6 in the revision of ISO 55002 and in making the preparations for the impending revision of ISO 55001. In recognition of this the TC's Secretariat had applied for an ISO Excellence Award for him, and was delighted that the Secretary General of ISO, Sergio Mujica, had agreed to grant one to him. A small ceremony was held at the start of the meeting when Dick Hortensius (from the Royal Netherlands Standardization Institute) went to Ton's offices to present him with the award certificate. In addition, at its meeting in Nanjing in 2019, the TC had kindly been presented with a number of artworks by notable Chinese artists. One of these was a scroll of calligraphic art by Yongsi Pan, which Dick also presented to Ton.



Ton and Dick



ISO Excellence Award certificate



ISO
TC 251

Poet: Wang Mian
Yuan Dynasty


A Quatrain by Wang Mian
(Yuan Dynasty)

1st sentence: Afore my inkstone-pool grows a plum tree.

2nd sentence: Each of its blooms with delicate ink blows.

3rd sentence: It craves no kudas for its hue from ye.

4th sentence: But all over the world its fragrance flows.



Mr. Yongsi Pan's Chinese name

Written by

The title of the poem

The Message

The people in TC251 purely focus on developing the asset management subject which will improve management practice. Its from people's deep heart and experience. Our delegates do not focus on the money, reputation, or any other things generated by doing this work and our message flows around the world

The scroll presented to Ton

In closing the meeting, the Chair stated that he considered that the committee had made very good progress in all its activities, before thanking all the members for their contributions. He reiterated the need to bring-in more experts to increase the diversity of the membership of the committee and to support its growing work programme.

Following the meeting, an online social event was held using Wonder software (which is free to use) and was well received by the participants. Our thanks to Boudewijn Neijens for setting this up and for managing the event.

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