

# Sustainability: FM standards charting the course



12 December 2023

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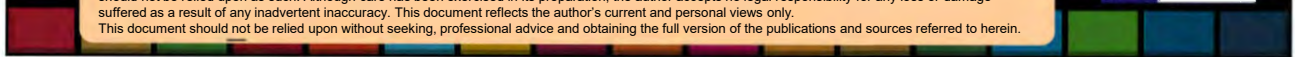
[Stephen.Ballesty@in-touchadvisory.com](mailto:Stephen.Ballesty@in-touchadvisory.com)

- Stephen’s consulting firm **In-Touch Advisory** connects stakeholders with solutions for the Built Environment across the property–construction–facilities life cycle.
- He is the AIQS’ representative to Standards Australia’s MB-022 Committee for FM standards, and in turn an Australian delegate ISO/TC-267 (ISO 41000 facility management since 2012), ISO/TC-267’s global liaison to ISO/TC-251 (ISO 55000 asset management since 2013).
- Stephen has also been an IFMA Standards Committee member since 2017 and is the Regional Director – Australasia & Southeast Asia for IFMA’s FM Consultant Council.
- He is also a former member of the IFMA Global Board of Directors and a Past Chair of both the FMA Australia and IFMA Foundation.





**Acknowledgements:** Support of the ISO, Standards Australia, AIQS and the UN in making today’s content possible.

This document has been prepared for the IWFM Ireland webinar event on 12 December 2023 in Dublin. It should be noted that this document represents a summary of the issues addressed and does not constitute advice. The author makes no representation as to its accuracy or completeness and the information should not be relied upon as such. Although care has been exercised in its preparation, the author accepts no legal responsibility for any loss or damage suffered as a result of any inadvertent inaccuracy. This document reflects the author’s current and personal views only. This document should not be relied upon without seeking, professional advice and obtaining the full version of the publications and sources referred to herein.




## Sustainability: FM standards charting the course






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- ❑ Sustainability 101
- ❑ ISO 41000 series scope and status
- ❑ Sustainable Development Goals (SDGs)
- ❑ ISO/TR 41019 *“FM’s role in sustainability, resilience and adaptability”*
- ❑ Towards *“Sustainable FM”* and its implications



## Sustainability 101 ... carbon emissions are BAD



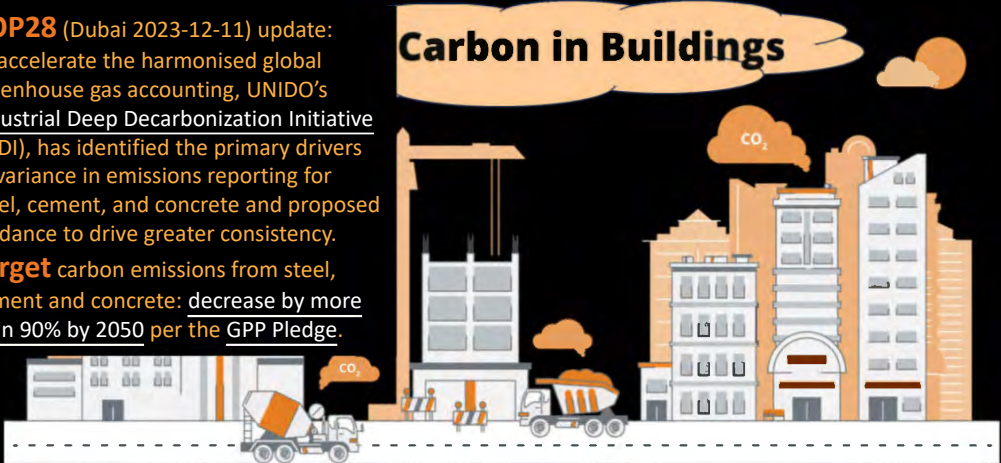
**COP28** (Dubai 2023-12-11) update: To accelerate the harmonised global greenhouse gas accounting, UNIDO’s Industrial Deep Decarbonization Initiative (IDDI), has identified the primary drivers of variance in emissions reporting for steel, cement, and concrete and proposed guidance to drive greater consistency.

**Target** carbon emissions from steel, cement and concrete: decrease by more than 90% by 2050 per the GPP Pledge.

**Our industry**

In 2021, Buildings and Construction sector accounted for **37% of carbon emissions** and over 34% of energy demand globally.

Source: 2022 UNEP Global Status Report for Buildings & Construction




### Carbon in Buildings

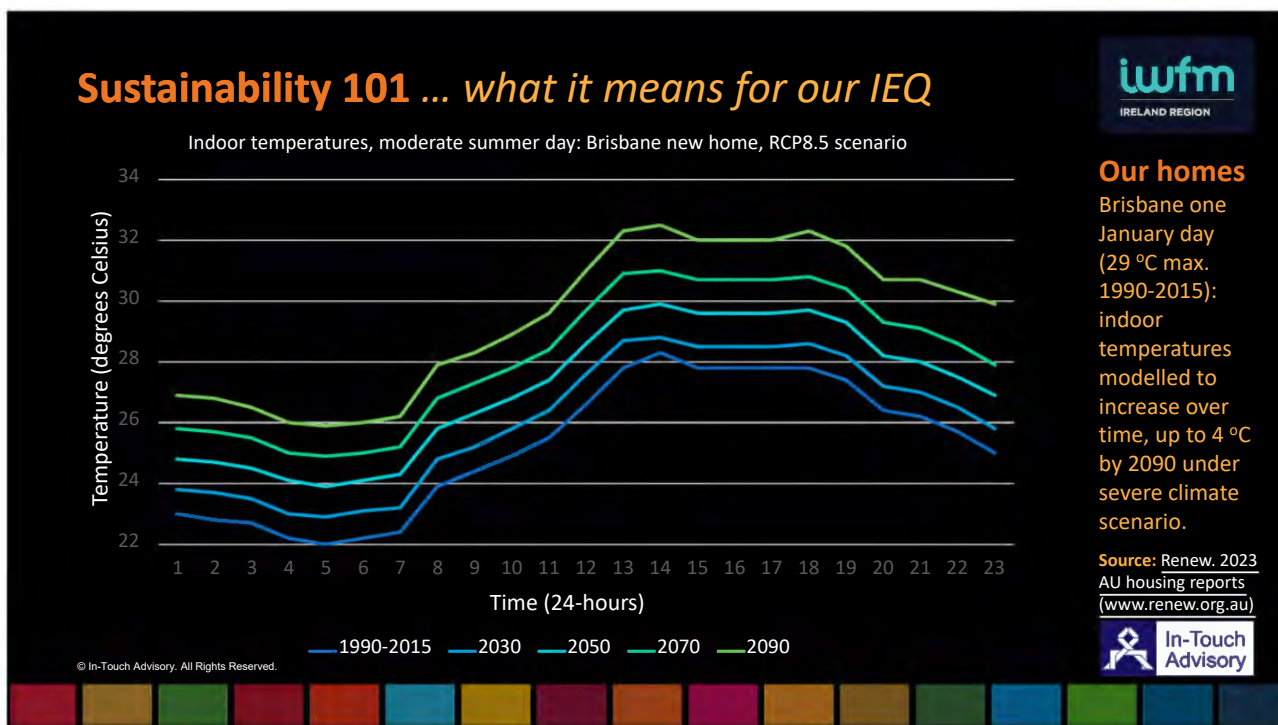
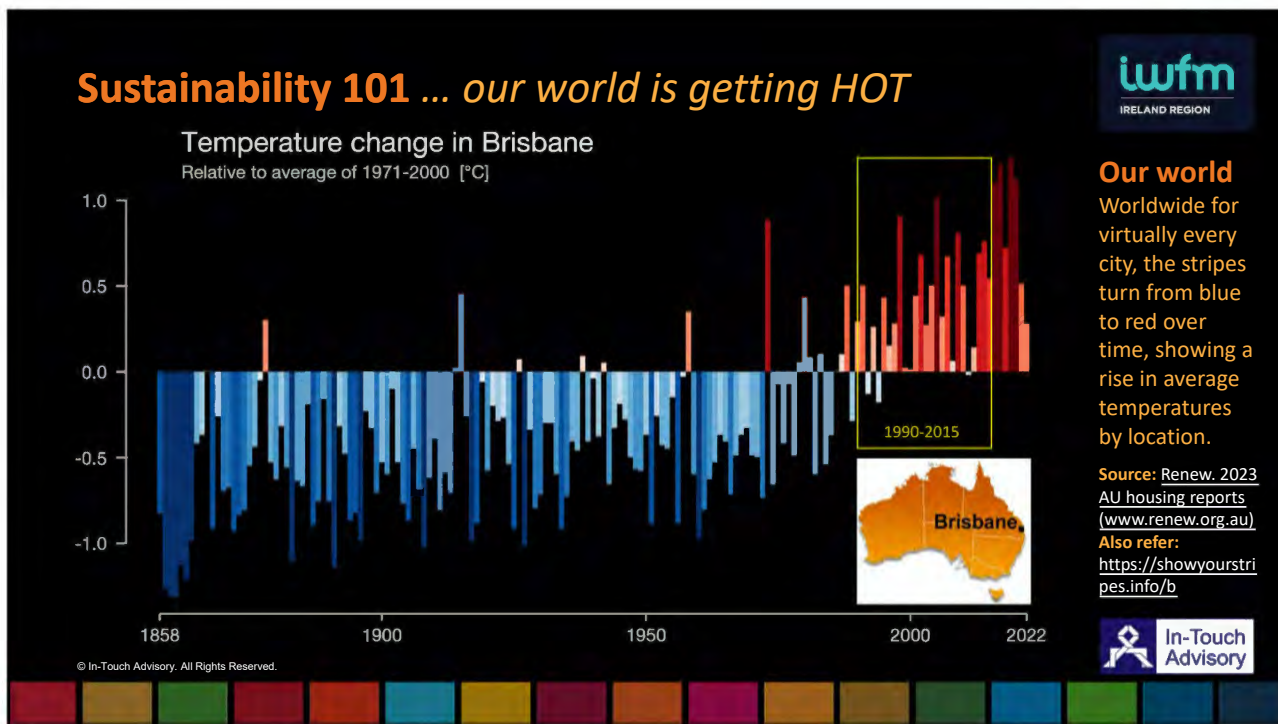
**Embodied Carbon**

The emissions from manufacturing, transportation, and installation of building materials.

**Operational Carbon**

The emissions from a building's energy consumption.





**Our world**  
Worldwide for virtually every city, the stripes turn from blue to red over time, showing a rise in average temperatures by location.

Source: Renew. 2023 AU housing reports ([www.renew.org.au](http://www.renew.org.au))  
Also refer: <https://showyourstripes.info/b>



**Our homes**  
Brisbane one January day (29 °C max. 1990-2015): indoor temperatures modelled to increase over time, up to 4 °C by 2090 under severe climate scenario.

Source: Renew. 2023 AU housing reports ([www.renew.org.au](http://www.renew.org.au))



# Sustainability 101 ... targets must be MET



"Sustainable development meets the needs of the present without compromising the ability of future generations to meet their own needs"  
**Gro Harlem Brundtland**, Chair / Author, the UN's Our Common Future, also known as the Brundtland Report, October 1987

**Agenda 2030**  
UN's 2015 report:  
*Transforming our world: the 2030 Agenda for Sustainable Development.*

Source: United Nations, Dept. of Economic and Social Affairs (un.org)



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# Sustainability 101 ... green buildings WORK



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**Our future**  
"By 2050, the global population will increase 27% to 9.8 billion, and by 2060 global building floor area is expected to double".

Source: World Green Building Council (worldgbc.org)



**Sustainability 101 ... it's about quality of LIFE**

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**Our future**  
17 SDGs are interlinked goals for a "shared blueprint for peace and prosperity for people and the planet, now and into the future".

Source: Sustainable Development (sdgs.un.org).

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**Standards Matter, for the understanding of ...**

a common language	consistent reporting	greater transparency
data capture, costing, analysis and forecasts	ability to performance benchmarking	increased confidence through reduced risk

**... of global transparency, comparability and collaboration on solutions.**

## Standards Matter, for an understanding of ...



### □ Facility Management, Facilities Management or FM:

an "organizational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business"

ISO 41011:2017 – ISO/FDIS 41011 (2023)

### □ Demand Organization: the "entity which has a need and the authority to incur costs to have requirements met"

ISO 41011:2017 – ISO/FDIS 41011 (2023)

### □ FM Organization: the "entity responsible for facility management"

ISO 41014:2020 – ISO/FDIS 41011 (2023)



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## Standards Matter, for an understanding of ...

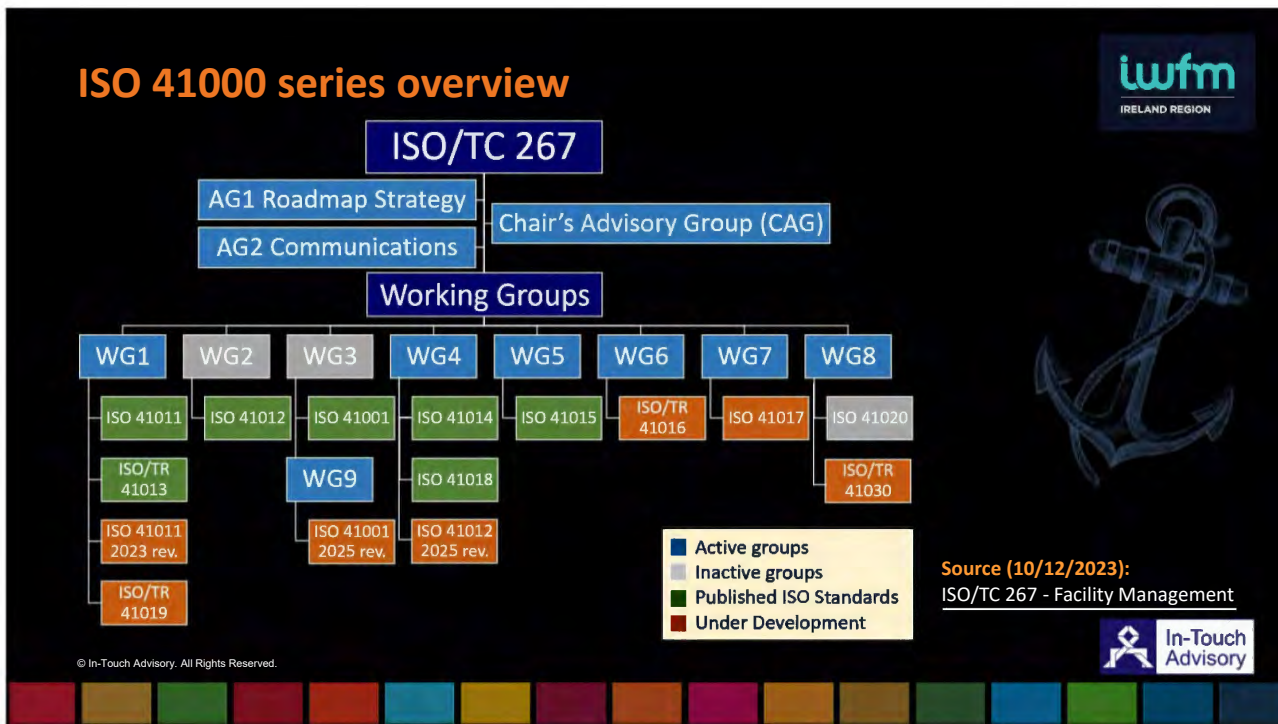
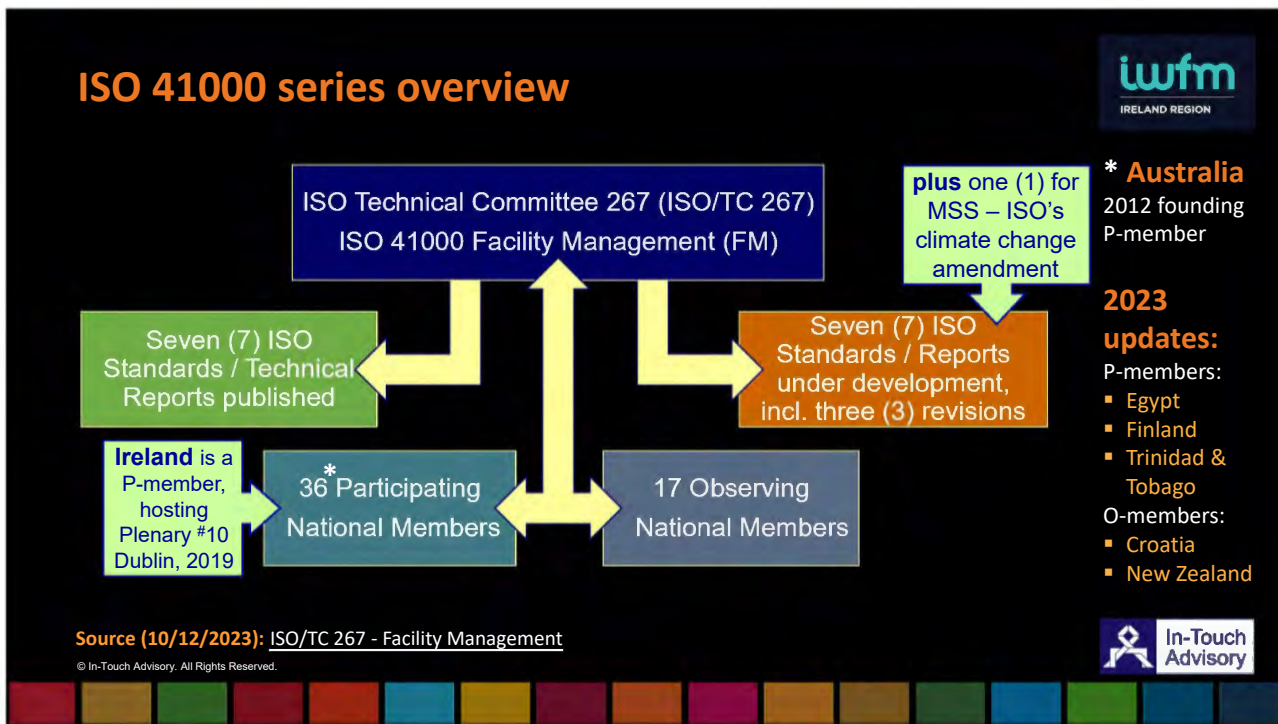


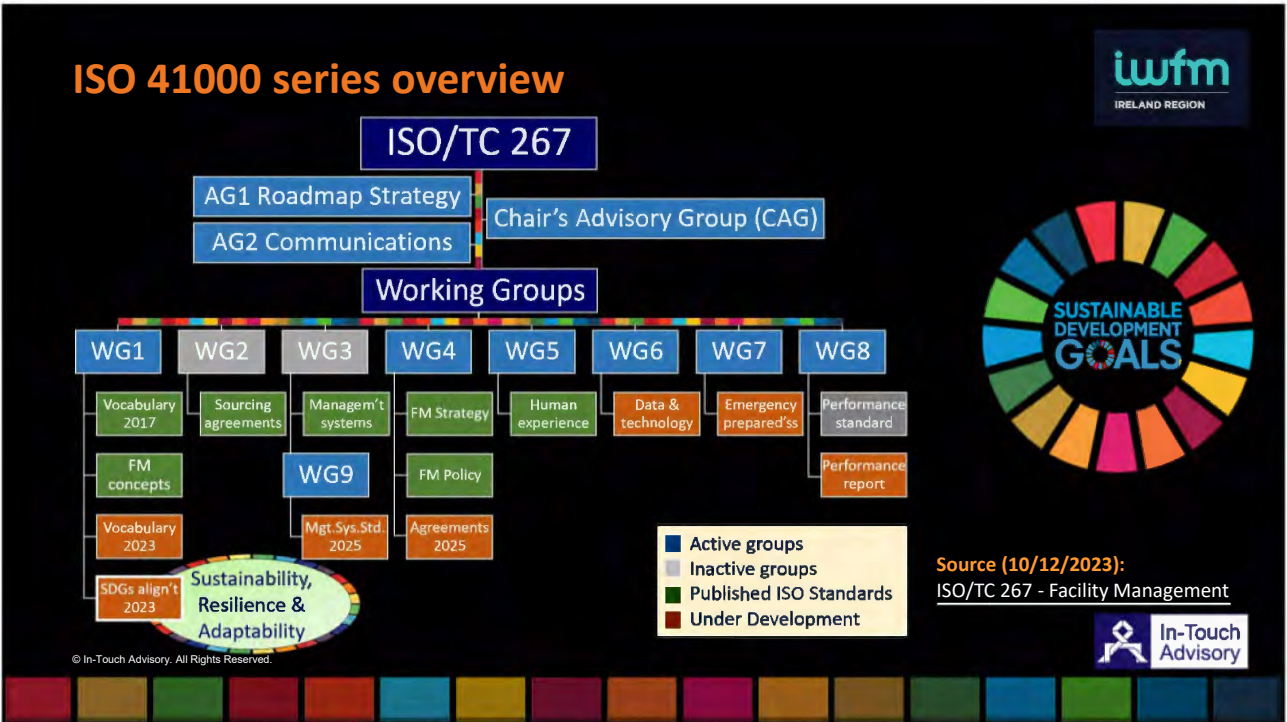
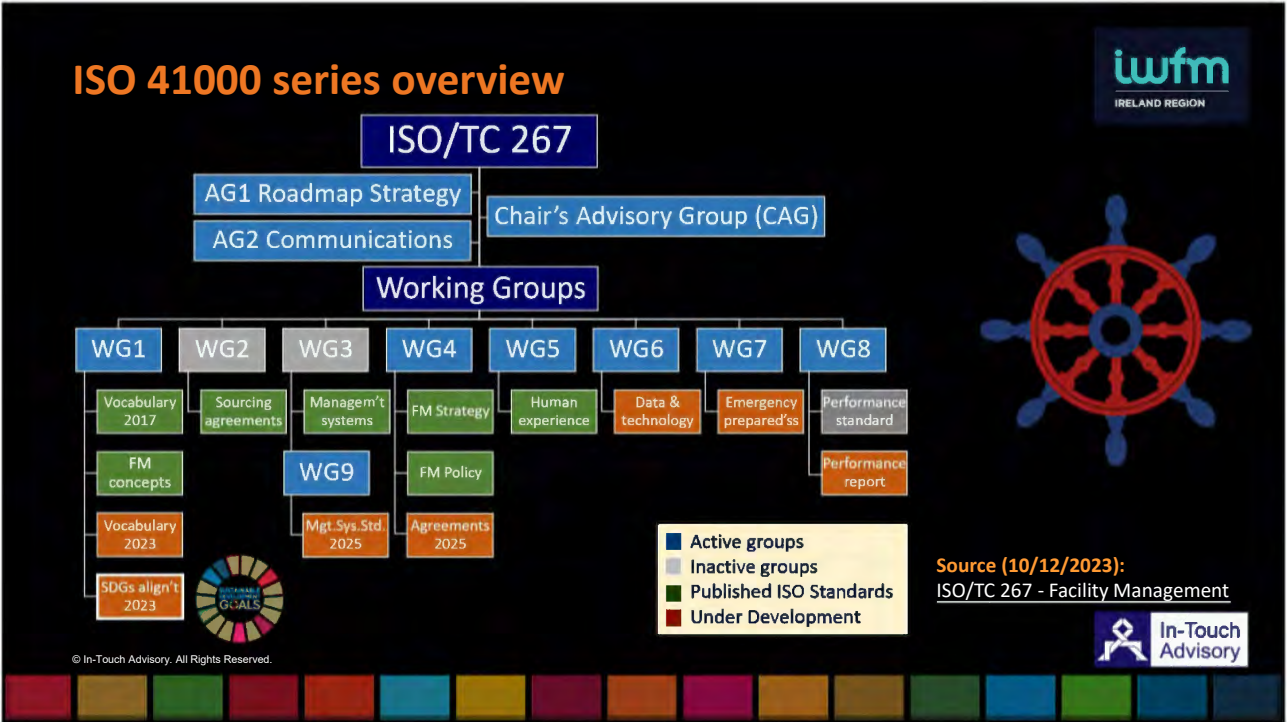
Source: adapted from ISO 41001:2018



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## ISO/TC 267: Current ISO outputs




PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT <small>(titles may be subject to revision)</small>
ISO 41011:2017 FM - Vocabulary	ISO/AWI 41001 FM - Management systems - Requirements with guidance for use (2 <sup>nd</sup> edition, revision)
ISO 41012:2017 FM - Guidance on strategic sourcing and the development of agreements	ISO/FDIS 41011 FM - Vocabulary (2 <sup>nd</sup> edition, revision)
ISO/TR 41013:2017 FM - Scope, key concepts and benefits	ISO/AWI 41012 FM - Guidance on strategic sourcing and the development of agreements (2 <sup>nd</sup> edition, revision)
ISO 41001:2018 FM - Management systems - Requirements with guidance for use	ISO/DTR 41016 FM - Overview of available technologies
ISO 41014:2020 FM - Development of FM strategy	ISO/FDIS 41017 FM - Guidance on emergency preparedness and management of an epidemic
ISO 41015:2023 FM - Influencing behaviors for improved facility outcomes	ISO/DTR 41019 FM - Role in sustainability, resilience and adaptability
ISO 41018:2022 FM - Development of a FM policy	ISO/CD TR 41030 FM - Existing performance management in facility management organizations

**Source (10/12/2023):** ISO/TC 267 - Facility Management



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## ISO/TC 267: Current ISO outputs – 2023/24 release



PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT <small>(titles may be subject to revision)</small>
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ISO/TR 41013:2017 FM - Scope, key concepts and benefits	ISO/AWI 41012 FM - Guidance on strategic sourcing and the development of agreements (2 <sup>nd</sup> edition, revision)
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ISO 41018:2022 FM - Development of a FM policy	ISO/CD TR 41030 FM - Existing performance management in facility management organizations

**plus ISO's 2024 climate change amendment**

**Source (10/12/2023):** ISO/TC 267 - Facility Management



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## Sustainable Development Goals (SDGs)




**1** NO POVERTY  


**2** ZERO HUNGER  


**3** GOOD HEALTH AND WELL-BEING  


**4** QUALITY EDUCATION  


**5** GENDER EQUALITY  


**6** CLEAN WATER AND SANITATION  


**7** AFFORDABLE AND CLEAN ENERGY  


**8** DECENT WORK AND ECONOMIC GROWTH  


**9** INDUSTRY, INNOVATION AND INFRASTRUCTURE  


**10** REDUCED INEQUALITIES  


**11** SUSTAINABLE CITIES AND COMMUNITIES  


**12** RESPONSIBLE CONSUMPTION AND PRODUCTION  


**13** CLIMATE ACTION  


**14** LIFE BELOW WATER  


**15** LIFE ON LAND  


**16** PEACE, JUSTICE AND STRONG INSTITUTIONS  


**17** PARTNERSHIPS FOR THE GOALS  




**Source:** United Nations <https://sdgs.un.org/goals>


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*"With ISO standards, we can contribute to making the 2030 Agenda a reality, so no one is left behind"*

Sergio Mujica, ISO Secretary-General

## Sustainable Development Goals (SDGs) & ISO Standards



**ISO impact at a glance:** number of ISO standards that are directly applicable to each SDG (<https://www.iso.org/sdgs.html>)

**34,833** individual ISO standards alignments with single SDGs

**ISO 41000 series FM standards**

**SUSTAINABLE DEVELOPMENT GOALS**

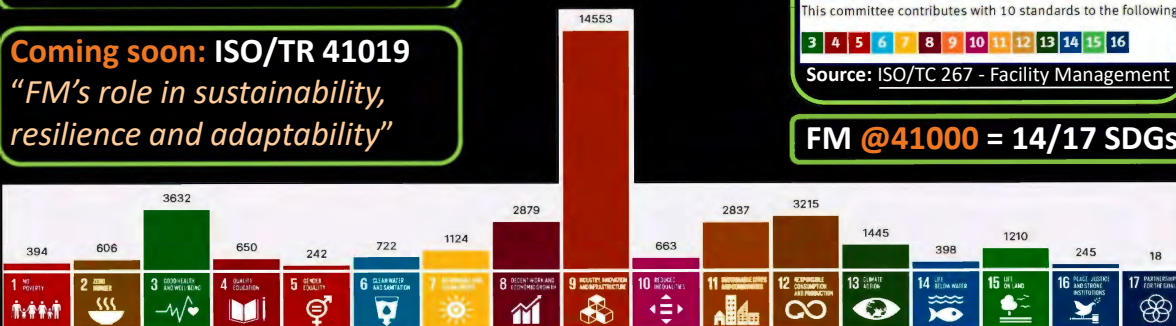
This committee contributes with 10 standards to the following

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16

**Source:** ISO/TC 267 - Facility Management

**FM @41000 = 14/17 SDGs**

**Coming soon: ISO/TR 41019**  
*"FM's role in sustainability, resilience and adaptability"*



SDG	Number of ISO Standards
1	394
2	606
3	3632
4	650
5	242
6	722
7	1124
8	2879
9	14553
10	663
11	2837
12	3215
13	1445
14	398
15	1210
16	245
17	18

**Source (10/12/2023):** ISO - Sustainable Development Goals

## ISO/TR 41019 ... what to expect




- ❑ **Deliverable:** an ISO Technical Report (TR) supporting FM standards and the **SDGs**.
- ❑ **Status:** DTR (draft) subject to ISO editorial and ballot, **early 2024 publication**.
- ❑ **Scope:** FM's role in sustainability, resilience, adaptability, etc.
  - Introduction, scope, normative references, terms and definitions.
  - Concepts, context and challenges – CSR, ESG, climate change, net-zero & circular economy.
  - Sustainable Development Goals (SDGs).
  - Role of ISO standards in supporting the SDGs.
  - FM and SDGs in context – sustainability, resilience and adaptability.
  - Role of current ISO 41000 series; and Towards Sustainable FM.
  - Annexures – alignment matrices, tools, related standards and bibliography.
- ❑ **Style:** concise and practical guidance for FM professionals.



Source: ISO/DTR 41019 (2023) 

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## ISO/TR 41019 “Facility Management’s role in sustainability, resilience and adaptability”



**Society**

UN Sustainable Development Goals (SDGs)

Demand Organization

Environmental, Social & Governance (ESG)

↓

**Built Environment**

FM Strategies

FM Policies

FM Operations

Performance Management, Measurement and Continuous Improvement

↓


Efficiency & Productivity

Liveability & Affordability

Resilience & Adaptability

Quality of Life

- ❑ **Demand Organizations** operate within a broader **Societal context**.
- ❑ **ISO/TR 41019** demonstrates the wide-ranging and positive contributions that FM can make through responsibly managing the **Built Environment**.
- ❑ **SDGs and ESG** provide frameworks to deliver outputs that support society, and enhance our **Quality of Life**.

Source: ISO/DTR 41019 (2023) 

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## ISO/TR 41019 Annexures



- ❑ **Annex A (informative): ISO 41000 series alignment with the United Nations Sustainable Development Goals (SDGs)**
  - A.1 ISO 41000 alignment with the SDGs matrix – summary of published and planned outputs as at 30 August 2023
- ❑ **Annex B (informative): Towards Sustainable FM via the ISO 41000 series**
  - B.1 Sustainable FM a 10-steps approach with ISO 41000
  - B.2 Demand Organization preparation assessment
  - B.3 Examples of FM actions striving for sustainable development
  - B.4 Support for Environmental, Social, and Governance (ESG) reporting
- ❑ **Annex C (informative): Related ISO committees and related standalone standards**
- ❑ **Bibliography:** includes over 90 useful references

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Source: ISO/DTR 41019 (2023)



## Towards Sustainable FM



- ❑ **FM should support Demand Organizations to achieve:**
  - Alignment with the SDGs and adoption ESG framework reporting.
  - Compliance with regulatory or statutory requirements.
  - Compliance with industry guides and best practice.
  - Demonstration of industry leadership and enhanced reputation.
  - Increased value: end-user amenity and return on investment (ability to charge).
  - Increased productivity and profitability (changes in processes / access to resources).
  - Reduced capital costs during the design and construction phases.
  - Reduced life cycle costs during the operational phases.
  - Responsiveness to stakeholder communities.

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Source: ISO/DTR 41019 (2023)






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**Vision:**  
*'FM as the foremost contributor to a more productive, sustainable and liveable Built Environment for all'.*

**Source:** Australian Government FM Action Agenda: Managing the Built Environment series (2004-2008)

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**FM in 2023** is confronted by globally turbulent times and navigating the stormy waters ahead ....

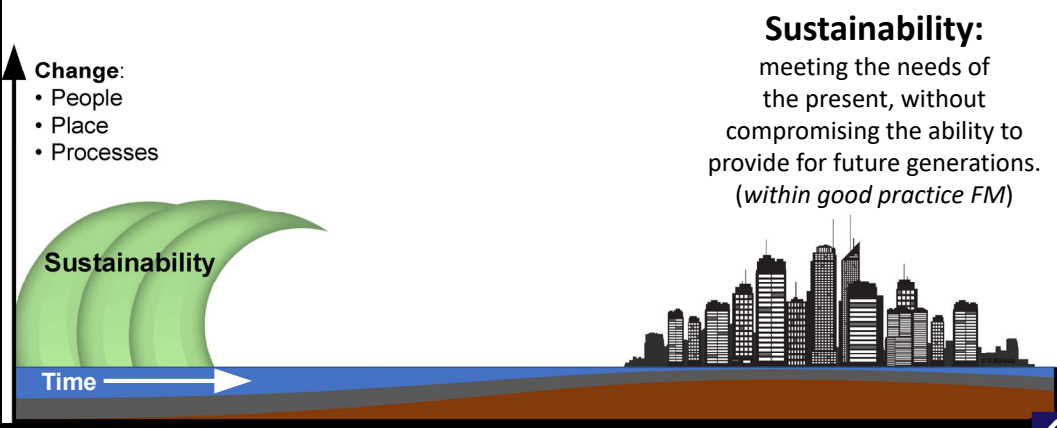
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# Sustainability, Resilience & Adaptability



## FM challenges: the First Wave



**Sustainability:**  
meeting the needs of the present, without compromising the ability to provide for future generations.  
*(within good practice FM)*

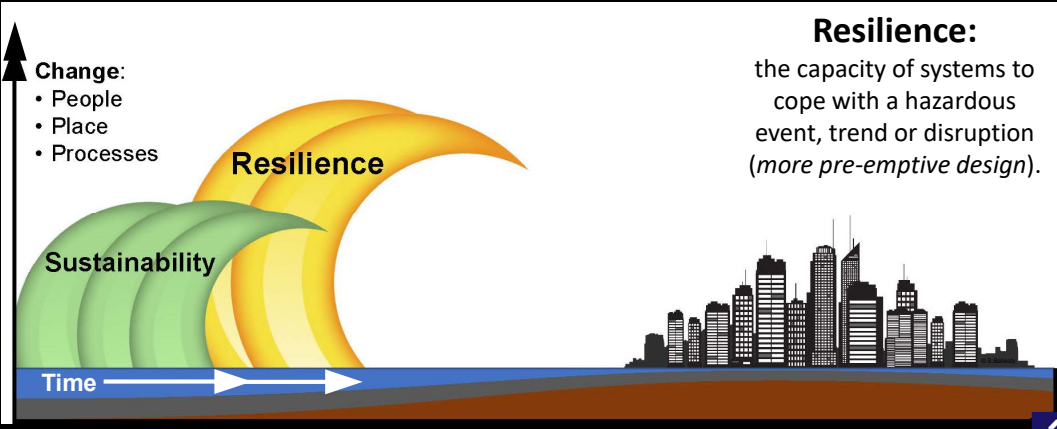
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# Sustainability, Resilience & Adaptability



## FM challenges: the Second Wave




**Resilience:**  
the capacity of systems to cope with a hazardous event, trend or disruption  
*(more pre-emptive design).*

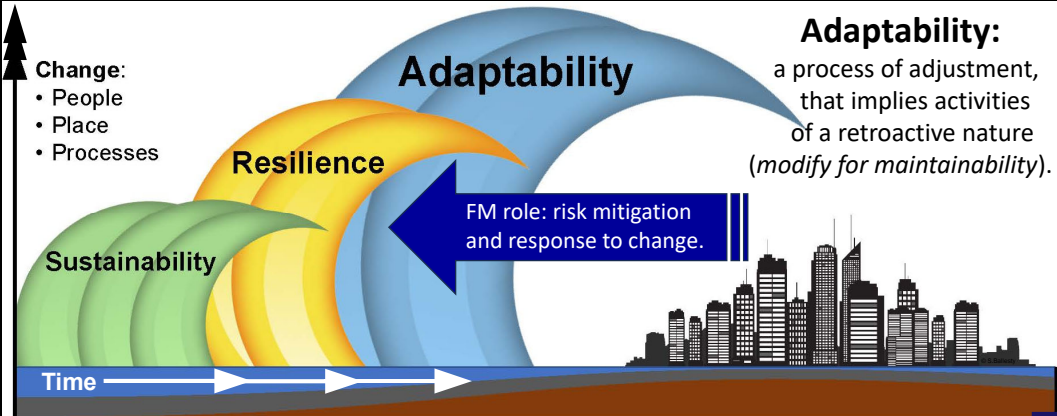
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## Sustainability, Resilience & Adaptability



**FM challenges: the Third Wave**




**Change:**

- People
- Place
- Processes


**Adaptability:**  
a process of adjustment, that implies activities of a retroactive nature (*modify for maintainability*).

FM role: risk mitigation and response to change.



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## Sustainability, Resilience & Adaptability



**Is FM ready for the Third Wave? ..... time for Sustainable FM**




**Change:**

- People
- Place
- Processes

**New FM metrics:**

- Efficiency
- Productivity
- Liveability
- Affordability
- Resilience
- Adaptability

Quality of Life



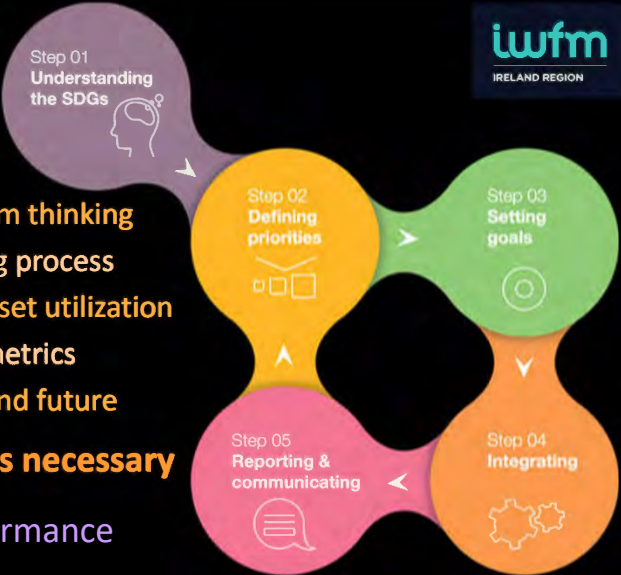
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## Transformation – FM's role

- 1) Sustainable FM practices
- 2) Flexible workplaces and remote teams
- 3) Commitment to the SDGs and long-term **thinking**
- 4) Integrated data-driven decision-making **process**
- 5) Demand management and optimize **asset utilization**
- 6) Re-definition of success and new **FM metrics**
- 7) Recognition of quality of life: **current and future**

**Transformation is not easy, but is necessary**

**FM standards** provide a useful performance framework for **charting your course**.




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## ISO 41000 series, so far and more



- ❑ **ISO/TC267 website**  
<https://committee.iso.org/home/tc267>
- ❑ **TC267 on LinkedIn, and follow #ISO41000**  
<https://www.linkedin.com/company/iso-tc-267>
- ❑ **ISO 41000 series FM standards status**  
<https://www.iso.org/committee/652901.html#meetings>
- ❑ **Management System Standards (MSS's)**  
ISO 55001 & ISO 41001 together to improve Performance and Quality of Life
- ❑ **Standards Australia FM standards adoption**  
<https://www.standards.org.au/standards-catalogue/sa-snz/other/mb-022>
- ❑ **UN Sustainable Development Goals**  
<https://sdgs.un.org/goals>

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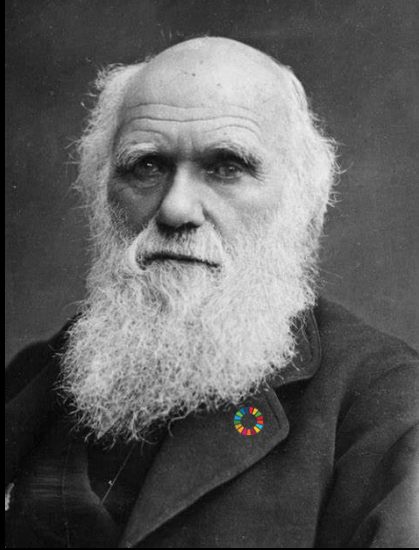




**Adapt to change, or die**

*"It is not the strongest of the species that survives, nor the most intelligent; it is the one most adaptable to change"*

**On the Origin of Species (1859)**

**Charles Darwin** (1809 – 1882)  
naturalist, geologist, and biologist

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**Sustainability:**  
FM standards charting the course

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12 December 2023





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