

ISO standards update: Asset & Facility Management and the Sustainable Development Goals



23 January 2024



Stephen Ballesty

FRICS, FAIQS, IFMA Fellow
CQS, ICECA, CFM
FMA Australia Life Member

In-Touch Advisory

in-touchadvisory.com

Stephen Ballesty



Stephen.Ballesty@in-touchadvisory.com

FRICS, FAIQS, IFMA Fellow, ICECA, CQS, CFM, FMA Australia Life Member

- ❑ 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 the liaison to MB-019 Committee for AM standards, the an Australian delegate to 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 current Regional Director – Australasia & Southeast Asia for IFMA's FM Consultant Council.
- ❑ He is also the former deputy chair of the Australian Government's FM Action Agenda; a former member of the IFMA Global Board of Directors; and a Past Chairman of both FMA Australia and the IFMA Foundation.



Acknowledgements: Work of the AIQS, ICMS, ISO, Standards Australia and the UN in making today's the content possible.

This document has been prepared for the AIQS webinar event on 23 January 2024 in Sydney. 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.



ISO standards update: AM/FM and the SDGs



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1. Standards 101
2. Facility Management (FM) ISO 41000 series scope and status
3. Asset Management (AM) ISO 55000 series scope and status
4. Sustainable Development Goals (SDGs)
5. ISO/TR 41019 *"FM's role in sustainability, resilience and adaptability"*



Standards Matter, *for an 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 101

Standard (noun)

“a level of quality or attainment”
 or *“something used as a measure, norm, or model in comparative evaluations”*

- Most standards are basically either:
 - a) those that specify requirements for compliance, or
 - b) those that provide guidance and recommendations.

For example: AS ISO 41001:2019,
Facility management – Management systems – Requirements with guidance for use



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Standards 101

Quantity Surveying

Built environment cost management professionals work within a range of *“standard”* vocabularies, practices, and frameworks, etc.

Such as:

- ICMS
- ANZSMM
- Information papers
- Industry guidelines
- Statutory regulations
- ISO & Australian Standards
- Procurement policies, eg. NSW



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Standards 101

International Standards Organization (ISO)

An independent, non-governmental international organization with membership of **170 NSBs** (national standards bodies), founded in 1947.

ISO members brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards that support innovation and provide solutions to global challenges.

- ❑ Currently **24,676** ISO Standards published.
- ❑ Only **80** Management System Standards (MSS).



Source: www.iso.org/about-us.html plus [ISO in figures](#) and [ISO Management system standards](#)

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Standards 101

International Standards Organization (ISO)



Source: www.iso.org/about-us.html and [ISO contributing to the UN Sustainable Development Goals](#)

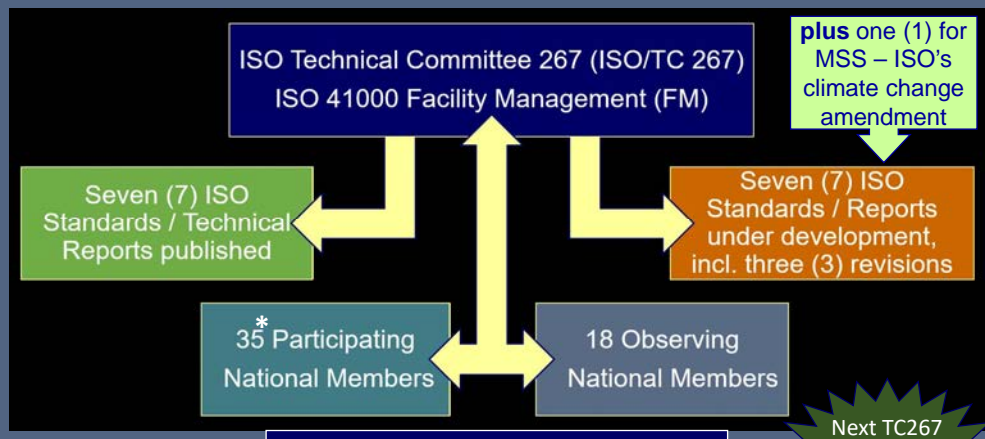
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Facility Management (FM) ISO 41000 series

ISO 41000 series overview – Facility Management standards



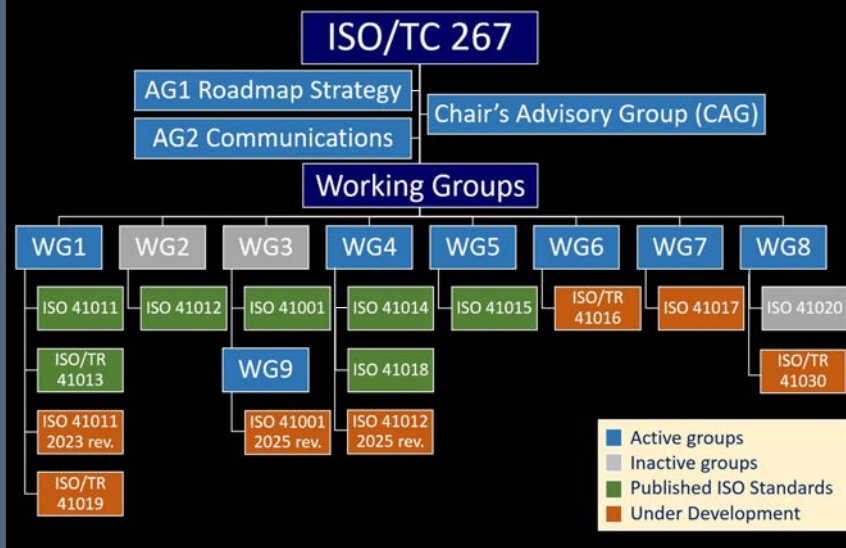
- * **Australia**
2012 founding P-member
- 2023 updates:**
P-members:
 - Egypt
 - Finland
 - Trinidad & Tobago
 O-members:
 - Croatia
 - New Zealand
 - Thailand

Next TC267 Plenary meetings – May 2024 in Panama

Source (18/01/2024): ISO/TC 267 - Facility Management
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ISO 41000 series overview – Facility Management standards

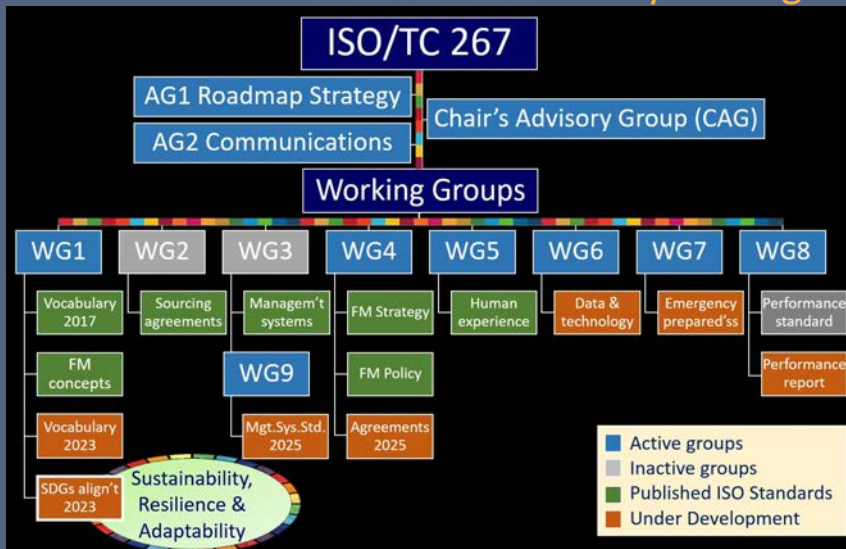


Source (18/01/2024):
 ISO/TC 267 - Facility Management



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ISO 41000 series overview – Facility Management standards



Source (18/01/2024):
 ISO/TC 267 - Facility Management



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ISO 41000 series overview – Facility Management standards

PUBLISHED ISO STANDARDS	UNDER DEVELOPMENT (titles may be subject to revision)
ISO 41011:2017 FM - Vocabulary	ISO/AWI 41001 FM - Management systems - Requirements with guidance for use (2 nd edition, revision) plus ISO's 2024 climate change amendment
ISO 41012:2017 FM - Guidance on strategic sourcing and the development of agreements	
ISO/TR 41013:2017 FM - Scope, key concepts and benefits	ISO/FDIS 41011 FM - Vocabulary (2 nd edition, revision)
ISO 41001:2018 FM - Management systems - Requirements with guidance for use	ISO/AWI 41012 FM - Guidance on strategic sourcing and the development of agreements (2 nd edition, revision)
ISO 41014:2020 FM - Development of FM strategy	ISO/DTR 41016 FM - Overview of available technologies
ISO 41015:2023 FM - Influencing behaviors for improved facility outcomes	ISO/FDIS 41017 FM - Guidance on emergency preparedness and management of an epidemic
ISO 41018:2022 FM - Development of a FM policy	ISO/DTR 41019 FM - Role in sustainability, resilience and adaptability
	ISO/CD TR 41030 FM - Existing performance management in facility management organizations

Source (18/01/2024): [ISO/TC 267 - Facility Management](#)

FM publications due in 2024 release



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AS ISO 41011:2019 FM (Standards Australia identical adoption of ISO 41011:2017)

□ 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), due for release 2024

□ 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), due for release 2024

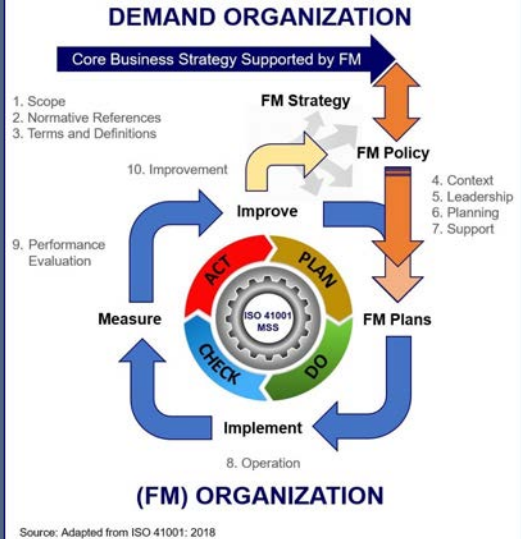
□ FM Organization: the "entity responsible for facility management"

ISO 41014:2020 – ISO/FDIS 41011 (2023), due for release 2024

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AS ISO 41001:2019 FM (Standards Australia identical adoption of ISO 41001:2018)



Management Systems Standard (MSS)

1. Scope
2. Normative References
3. Terms & Definitions
4. Context of the Organization
5. Leadership
6. Planning
7. Support
8. Operation
9. Performance Evaluation
10. Improvement

Using the **Plan-Do-Check-Act (PDCA)** approach.

ISO 41001 benefits include:
 "... improved efficiency and effectiveness, thus improving cost benefits to organizations".

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Source: AS ISO 41001:2019 (standards.org.au)



AS ISO 41001:2019 FM – QS contributions



The Iceberg Principle

15%

85%

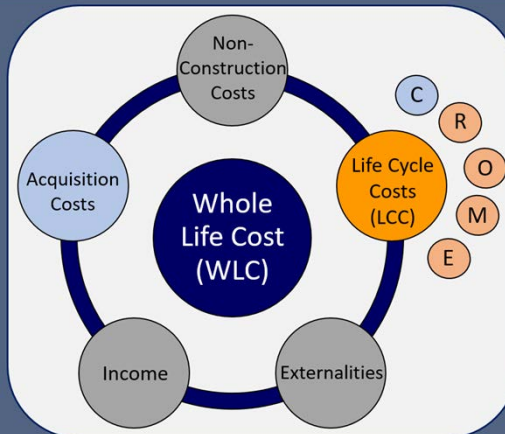
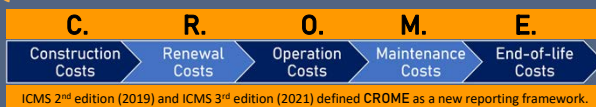
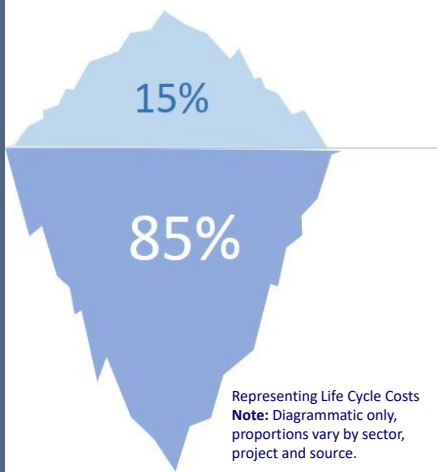
Representing Life Cycle Costs
Note: Diagrammatic only, proportions vary by sector, project and source.

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AS ISO 41001:2019 FM – QS contributions

The Iceberg Principle



'Costs' mentioned 25 times in ISO 41001

- 3.12 Process
- 3.15 Monitoring
- 3.16 Measurement
- 3.17 Audit
- 5.1 Managing risk
- 7.4 Communication
- 7.5 Documentation

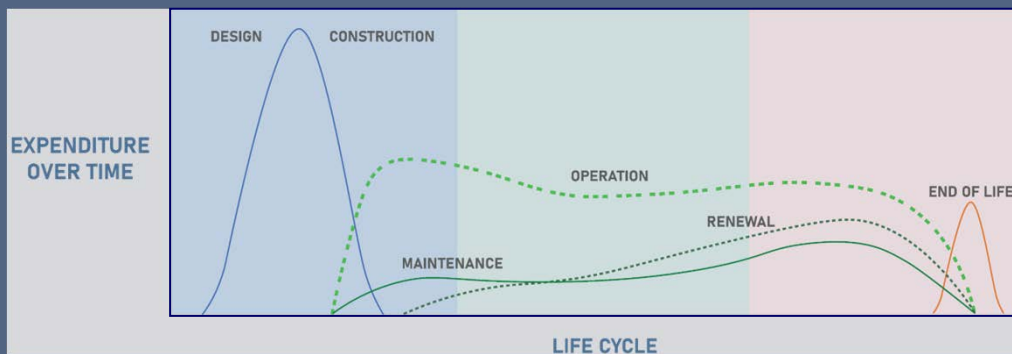


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AS ISO 41001:2019 FM – QS contributions

Cost Planning, Monitoring & Reporting

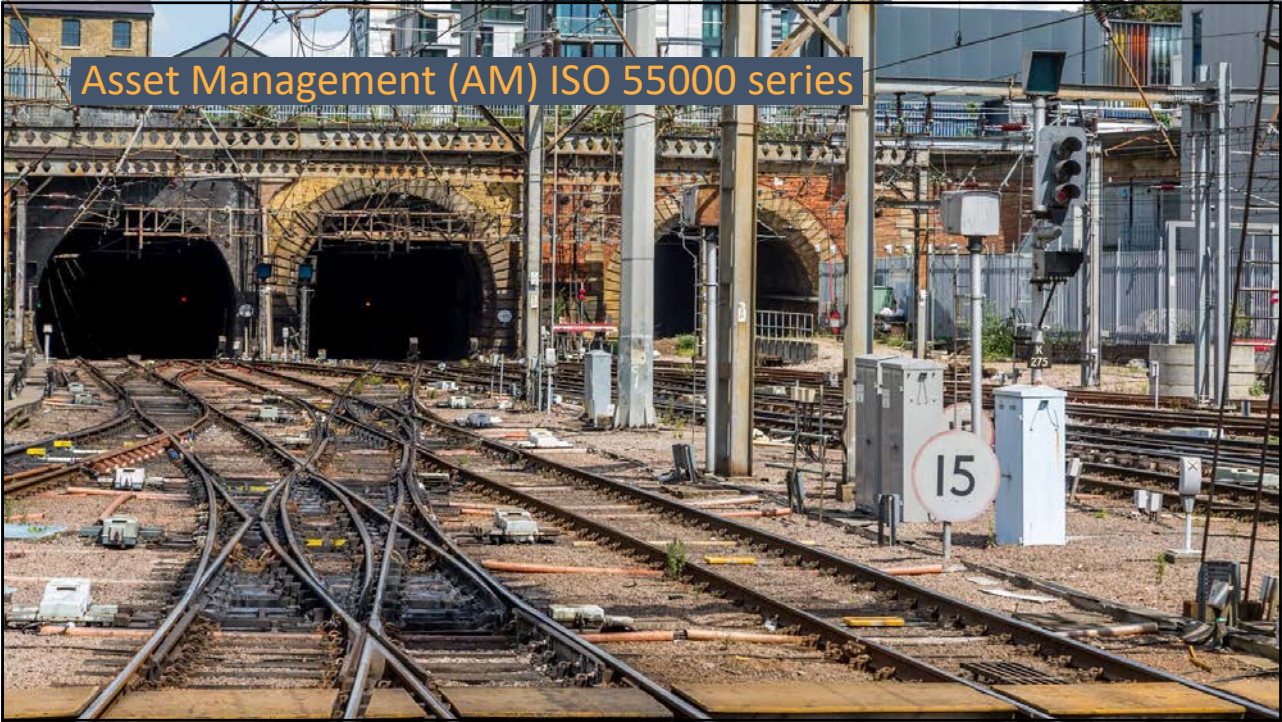
QS's are essential to the Cost Management process, and are uniquely positioned to influence improved Life Cycle Cost (LCC) and Whole Life Cost (WLC) outcomes in contributing to a more sustainable, productive, and liveable Built Environment.



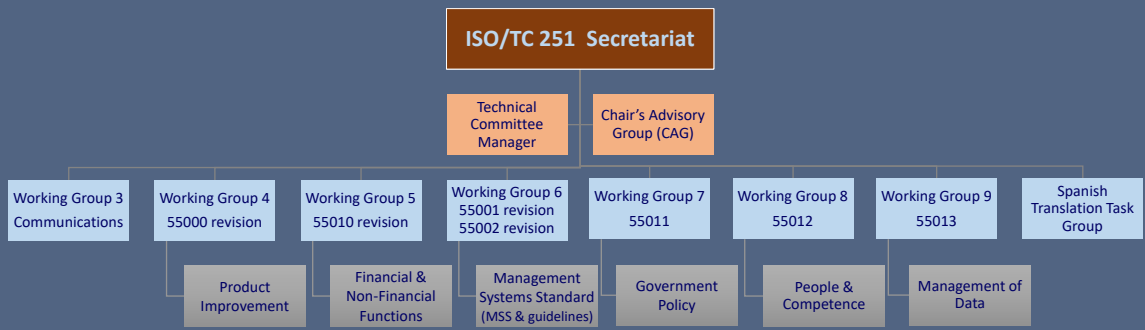
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Source: AIQS Information Paper: Life Cycle Cost Analysis (1st ed. 2022)





ISO 55000 series overview – Asset Management standards



- ISO/TC 251 statistics:**
- Four (4) standards published.
 - Six (6) standards under development.
 - 36 Participating national members.
 - 22 Observing national members.
 - 23 Liaisons on related ISO committees.

Source (18/01/2024): [ISO/TC 251 - Asset Management](#)

Next TC251
Plenary meetings
– Jan. 2024 in
Brasil



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ISO 55000 series overview – Asset Management standards

- **WG 3 – Communications:** Manages the public communications plan and activities for TC251. Manages the TC251 website and the Known Certified Organizations register. Publishes all guidance documents prepared by TC251.
- **WG 4 – Product Improvement and Revision of ISO 55000 (DIS - FDIS):** Manages the liaison of TC251 with other ISO and external workgroups that are active in the asset management space Manages the upcoming formal revision of ISO 55000.
- **WG 5 – Finance revision of ISO/TC 55010 (DTS):** Develops guidance on the financial aspects of asset management. Manages the revision of [ISO/TS 55010:2019](#) *Guidance on the alignment of financial and non-financial functions in asset management*.
- **WG 6 – Revision of ISO 55001 (DIS to FDIS) and ISO 55002 (DIS development):** Manages the revision of [ISO 55002:2018](#). Will manage the upcoming revision of [ISO 55001:2014](#).
- **WG 7 – Development of ISO 55011 (DIS - FDIS):** Manages the development of [ISO 55011](#) - *Guidance for development and application of public policy to enable asset management*.
- **WG 8 – Development of ISO 55012 (DIS - FDIS):** Manages the development of [ISO 55012](#) - *People involvement and competence*.
- **WG 9 – Development of ISO 55013 (DIS - FDIS):** Manages the development of [ISO 55013](#) - *Guidance on the management of Data Assets in asset management*.

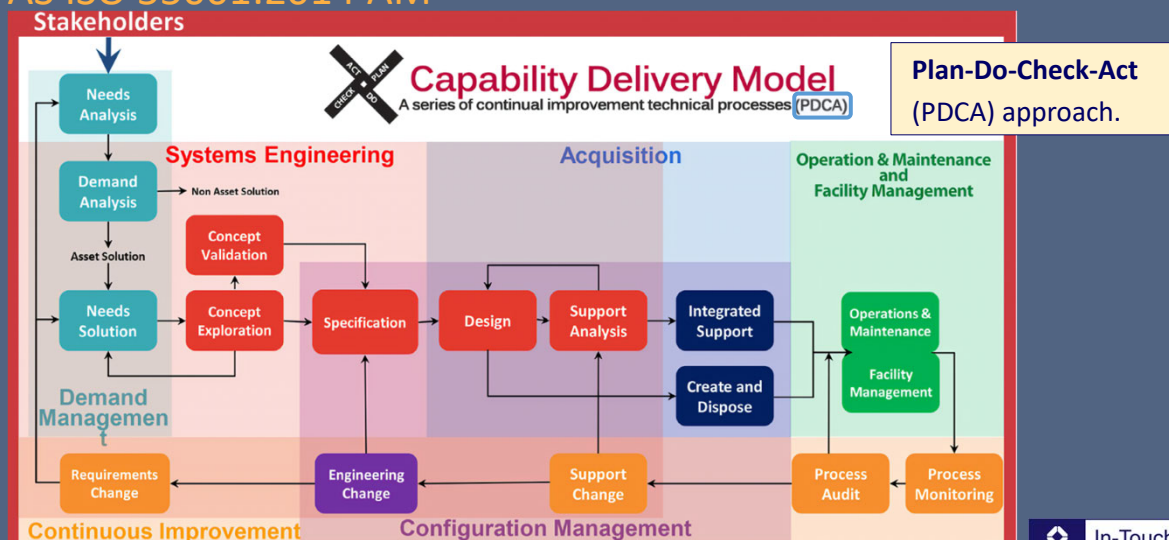
Source (18/01/2024): [ISO/TC 251 - Asset Management](#)

ISO terminology key:
 WG = Working Groups
 CD = Committee Draft
 DIS = Draft International Standard
 DTS = Draft Technical Specification
 FDIS = Final Draft International Standard



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AS ISO 55001:2014 AM



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Source: Model - Asset Management Council ([amcouncil.com.au](#))





Sustainable Development Goals (SDGs)

<p>1 NO POVERTY</p>	<p>2 ZERO HUNGER</p>	<p>3 GOOD HEALTH AND WELL-BEING</p>	<p>4 QUALITY EDUCATION</p>	<p>5 GENDER EQUALITY</p>	<p>6 CLEAN WATER AND SANITATION</p>
<p>7 AFFORDABLE AND CLEAN ENERGY</p>	<p>8 DECENT WORK AND ECONOMIC GROWTH</p>	<p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p>	<p>10 REDUCED INEQUALITIES</p>	<p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>	<p>12 RESPONSIBLE CONSUMPTION AND PRODUCTION</p>
<p>13 CLIMATE ACTION</p>	<p>14 LIFE BELOW WATER</p>	<p>15 LIFE ON LAND</p>	<p>16 PEACE, JUSTICE AND STRONG INSTITUTIONS</p>	<p>17 PARTNERSHIPS FOR THE GOALS</p>	



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

Sergio Mujica,
ISO Secretary-General

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



Sustainable Development Goals (SDGs) & ISO standards

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

35,124* individual ISO standards alignments with single SDGs

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

ISO 41000 series FM standards

SUSTAINABLE DEVELOPMENT GOALS

This committee contributes with 12 standards to the following

3 4 5 6 7 8 9 10 11 12 13 14 15 16

Source: ISO/TC 267 - Facility Management

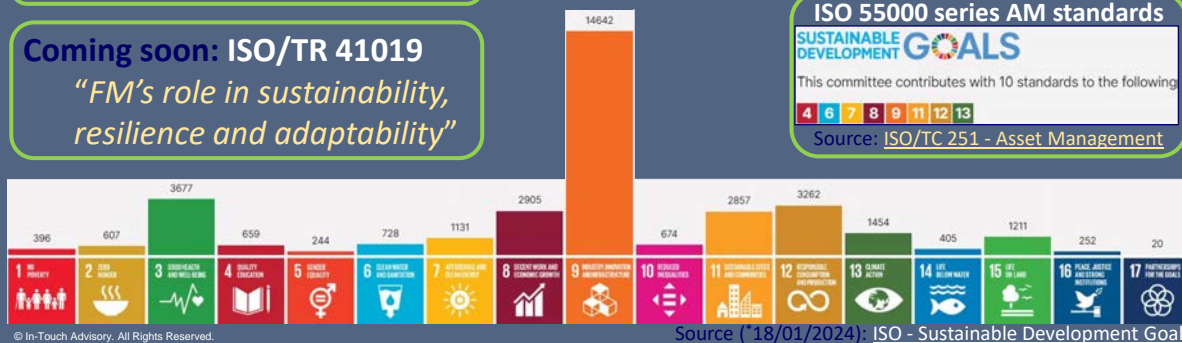
ISO 55000 series AM standards

SUSTAINABLE DEVELOPMENT GOALS

This committee contributes with 10 standards to the following

4 6 7 8 9 11 12 13

Source: ISO/TC 251 - Asset Management



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Source (18/01/2024): ISO - Sustainable Development Goals

Sustainable Development Goals (SDGs) challenges (9, 11 & 13)

9. BUILD RESILIENT INFRASTRUCTURE, PROMOTE INCLUSIVE AND SUSTAINABLE INDUSTRIALIZATION AND FOSTER INNOVATION

GLOBAL MANUFACTURING
 GROWTH SLOWED FROM 7.4% IN 2021 TO 3.3% IN 2022

ENERGY-RELATED CO₂ EMISSIONS
 REACHED 36.8 BILLION METRIC TONS IN 2022, A RECORD HIGH

STRONG GROWTH IN 2022
 HIGH-TECHNOLOGY INDUSTRIES EXPECTED TO SEE WITH ANNUAL GROWTH

95% OF THE WORLD
 HAS LIMITED ACCESS TO PUBLIC TRANSPORT

11. MAKE CITIES AND HUMAN SETTLEMENTS INCLUSIVE, SAFE, RESILIENT AND SUSTAINABLE

SLUMS ON THE RISE
 1.1 BILLION URBAN RESIDENTS ARE LIVING IN SLUMS, AND 1.5 BILLION MORE ARE EXPECTED IN THE NEXT 30 YEARS

AIR POLLUTION IS NO LONGER AN EXCLUSIVELY URBAN PROBLEM
 TOWNS EXPERIENCE MORE AIR POLLUTION THAN CITIES IN EASTERN AND SOUTH-EASTERN ASIA

3 IN 4 CITIES
 HAVE LESS THAN 20% OF THEIR AREA DEDICATED TO PUBLIC SPACES AND STREETS

1 BILLION PEOPLE LACK ACCESS TO ALL-WEATHER ROADS

13. TAKE URGENT ACTION TO COMBAT CLIMATE CHANGE AND ITS IMPACTS

EARTH'S TIPPING POINT
 STANDING AT THE BRINK OF CLIMATE CALAMITY

BILLIONS TO TROLLING
 GLOBAL CLIMATE FINANCE FLOWS REACHED AN ANNUAL RECORD OF \$260 BILLION IN 2020-2022

HIGHLY VULNERABLE REGIONS
 EXPERIENCE 40% HIGHER RISK OF LOSS OF LIVELIHOODS COMPARED TO LOW RISK AREAS

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Source: The Sustainable Development Goals Report 2023: Special Edition | UN DESA

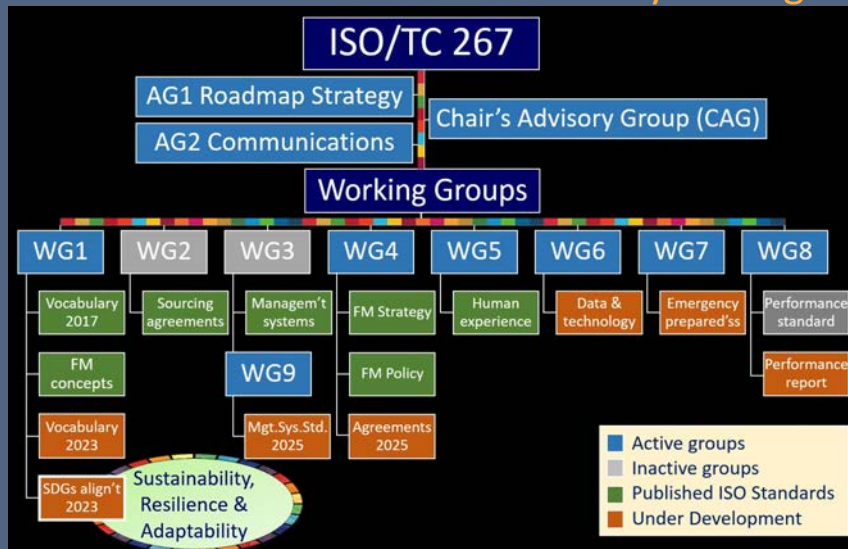


ISO/TR 41019

“FM’s role in sustainability, resilience and adaptability”



ISO 41000 series overview – Facility Management standards



Source (18/01/2024):
ISO/TC 267 - Facility Management



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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, **2024 Q1 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.



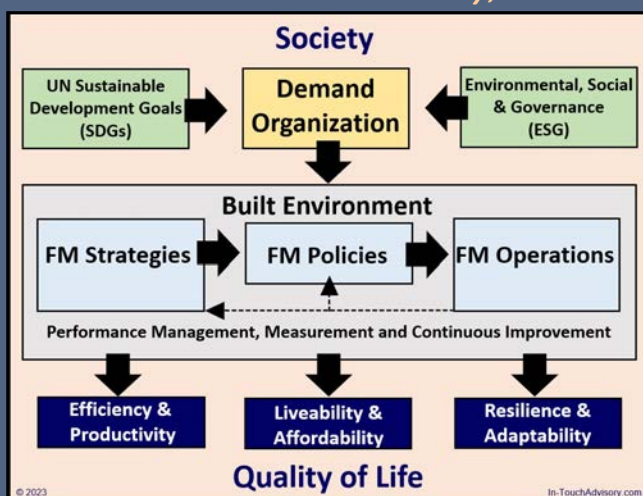
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Source: ISO/DTR 41019 (2023)



ISO/TR 41019

"FM's role in sustainability, resilience and adaptability"



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- ❑ **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)



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: 10-steps approach using the ISO 41000 series
 - B.2 Sustainable FM: 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, and the QS

QS FM should support Demand Organizations to achieve:

- # ■ Demonstration of industry leadership and enhanced reputation.
- # ■ Alignment with the SDGs and adoption ESG framework reporting.
- \$ ■ Compliance with regulatory or statutory requirements.
- \$ ■ Compliance with industry guides and best practice.
- \$ ■ Increased responsiveness to stakeholder communities.
- \$ ■ 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.



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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)



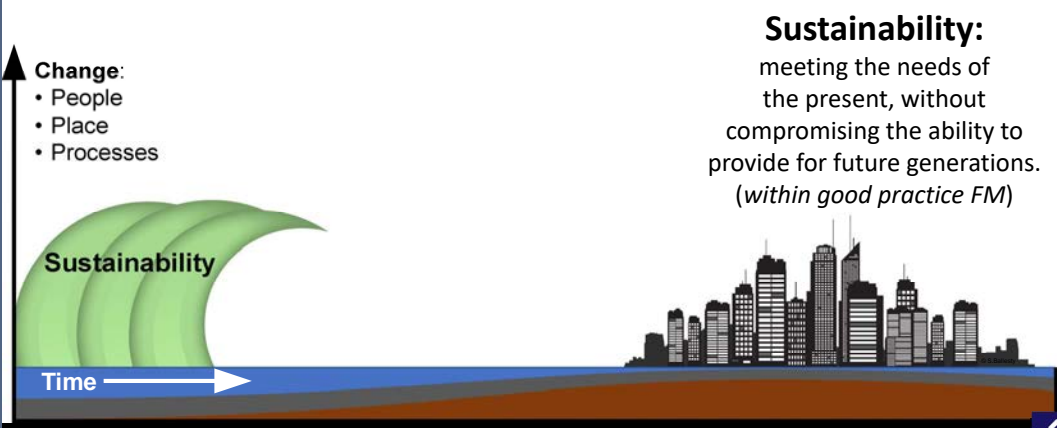
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2024 is
 confronted by globally turbulent times and navigating the stormy waters ahead



Sustainability, Resilience & Adaptability

Built Environment challenges: **the First Wave**



- Change:**
- People
 - Place
 - Processes

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**



- Change:**
- People
 - Place
 - Processes

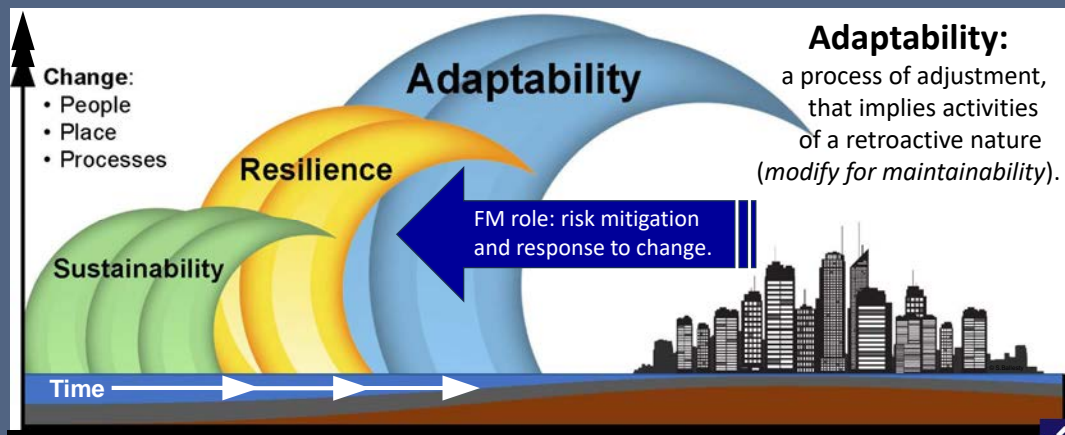
Resilience:
the capacity of systems to cope with a hazardous event, trend or disruption
(more pre-emptive design).

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Sustainability, Resilience & Adaptability

Built Environment challenges: **the Third Wave**

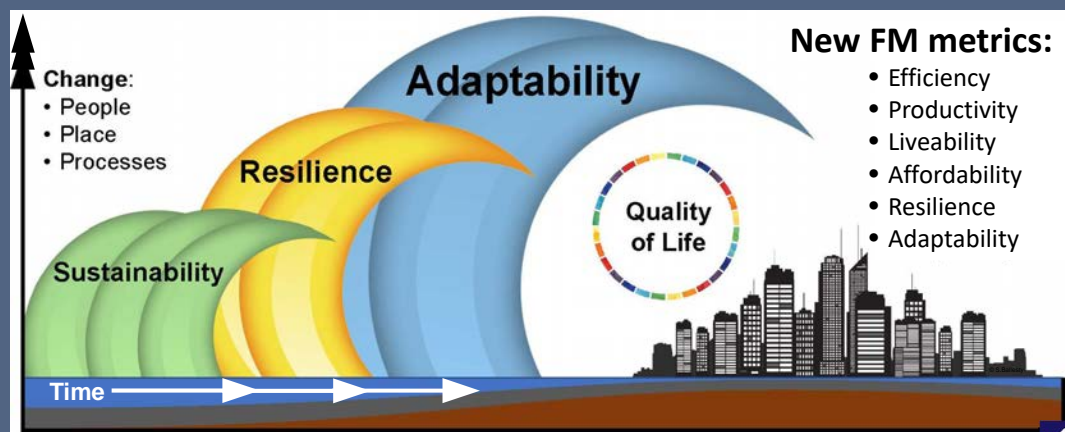


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Sustainability, Resilience & Adaptability

Are we ready for the Third Wave? time for **Sustainable FM**



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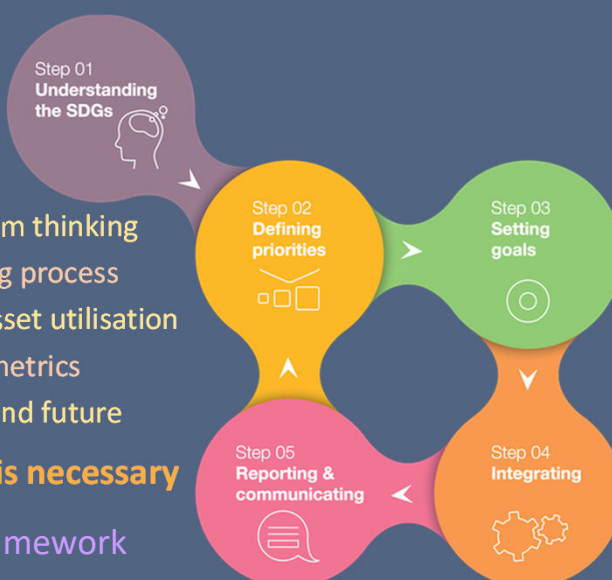


Transformation – required

- 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 optimise asset utilisation
- 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

... and standards provide a useful framework for performance measurement.



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Source: SDG Compass – The guide for business action the SDGs: <https://sdgcompass.org/>



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Transformation – QS supported



D.M.A.I.C. is an improvement cycle commonly used as a core tool used to drive Six Sigma projects.

Example: Life Cycle Cost (LCC) analysis – applications and benefits

- ❑ Comparative tool to evaluate different options, design solutions, components, or materials in support of strategic planning and investment decisions – *typically Design and Construction life cycle phases.*
- ❑ Management tool to provide a basis for improved budget planning and expenditure forecasts to support longer-term operational performance – *more commonly Asset / Facilities Management project life cycle phases.*

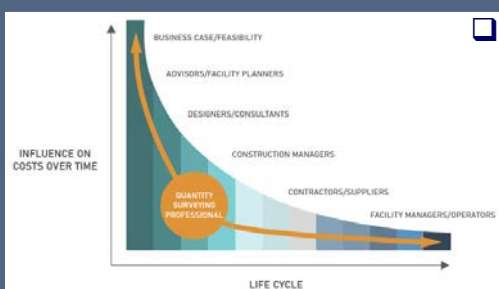
LCC analysis for improved communication and informed decision-making.

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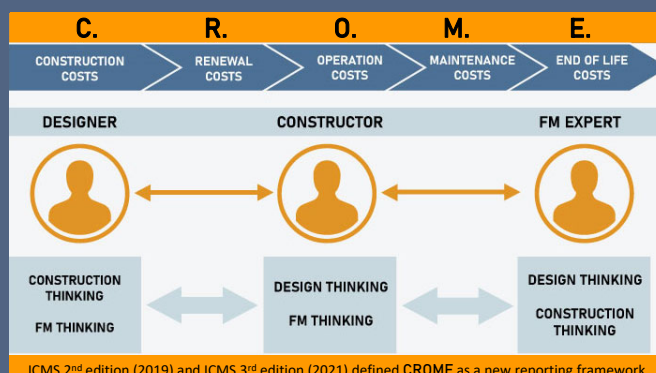
Source: AIQS Information Paper: Life Cycle Cost Analysis (1st ed. 2022)



Transformation – QS supported



- ❑ **C.R.O.M.E.** approach (ICMS#3, 2021) and the relationship framework across the facility life cycle.



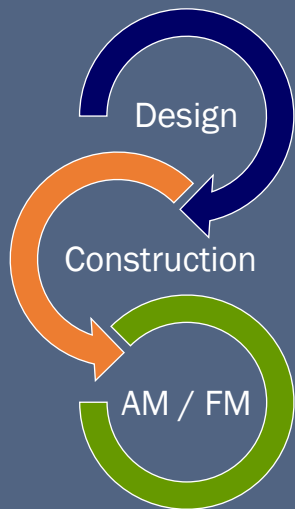
- ❑ **Cost** as a Communications tool, in decision-making – *translating technical performance into financial implications.*

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Source: AIQS Information Paper: Life Cycle Cost Analysis (1st ed. 2022)



Cost Management Life Cycle



FACILITY LIFE PHASE #	PROJECT STAGES OR ACMW & ICMS ELEMENTS	BASIS & DOCUMENTS REQUIRED	COST MANAGEMENT ACTIVITIES	LCC INTERFACE & DELIVERABLES
DESIGN	1. Briefing	Study Brief, sketches or relevant information.	Brief Stage Cost/Indicative Cost.	Business Case or Feasibility Study inputs based on facility policy and functional objectives.
	2. Define Proposals	Scope of works (use, type, location, plan, building shape, etc.) and functional areas.	Outline Proposal Cost/ Preliminary Estimates.	Life Cost Budgets related to project planning horizons and life expectancy targets.
	3. Sketch Design	Developed sketch plan, elevations and sections, structural sketches and specifications.	Sketch Development of Cost (Estimate) Cost Plan.	Life Cost Planning with comparative analysis and option selection.
	4. Documentation	Final working drawings and specifications prior to tender.	Tender Cost Plan (Basis Estimate).	Life Cost Plan pre design and option selection.
Project planning: reflective of current policies, standards, strategic objectives and understanding of risks and target LCC requirements.				
CONSTRUCTION	5. Tender	Issued Bill or Schedule of Prices.	Tender Report/contract administration and analysis.	Life Cost Plan pre tender.
	6. Construction	For construction documents.	Final Accounts/contract administration and finalisation.	Project Monitoring management review and option refinement.
Performance Evaluation: reflective of Facility plans, standards, monitoring, benchmarking and meeting target LCC requirements.				
ASSET / FACILITIES MANAGEMENT	7. Renewal	Costs of replacing a Facility, Constructed Asset and/or major components over the useful life and end of life life, and which the client decides are to be included in the capital rather than the revenue budget.		CAPEX budget to support the service delivery plan.
	8. Operation	Costs of running and managing a Facility, Constructed Asset, including administrative support services, rent, insurance, energy and other environmental/regulatory inspection costs, taxes and charges.		CAPEX budget to support the service delivery plan.
	9. Maintenance	Costs of corrective, responsive and preventative maintenance on a Facility, Constructed Asset or its parts and all associated management, clearing, services, upgrading, replacing or replacing of parts.		Maintenance Plan to support the service delivery plan.
	10. End of Life	Net costs or fees for disposing of an asset at the end of its service life after deducting the salvage value and other income due to disposal, including costs resulting from disposal inspection, decommissioning and decontamination, demolition and reconstruction, environmental, waste transfer obligations, recycling, recovery, disposal of components and materials, and transport and regulatory costs.		Business Case or Feasibility Study inputs based on facility policy, functional objectives, performance status and applicable regulatory and statutory requirements.

- AIQS' Australian Cost Management Manual - Volume 1, 4th edition (AIQS-ACMM#4, 2021).
- ICMS: Global Consistency in Presenting Construction Life Cycle Costs and Carbon Emissions, 3rd edition (ICMS#3, 2021).



Source: AIQS Information Paper: Life Cycle Cost Analysis (1st ed. 2022)

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ISO standards, so far plus SA and the UN's SDGs



- ISO/TC 267 - ISO 41000 series FM standards
STATUS: <https://www.iso.org/committee/652901.html#meetings>
COMMUNICATIONS: <https://committee.iso.org/home/tc267>
LINKEDIN: <https://www.linkedin.com/company/iso-tc-267> follow #ISO41000
- ISO/TC 251 - ISO 55000 series AM standards
STATUS: <https://www.iso.org/committee/604321.html>
COMMUNICATIONS: <https://committee.iso.org/home/tc251>
- AM & FM Management System Standards (MSS)
[ISO 55001 & ISO 41001 together to improve Performance and Quality of Life](https://www.iso.org/standard/55001.html)
- Standards Australia FM standards adoption
<https://www.standards.org.au/standards-catalogue/sa-snz/other/mb-022>
- UN Sustainable Development Goals (SDGs)
<https://sdgs.un.org/goals>

Artwork for the 10-year anniversary of the establishment of ISO/TC 267
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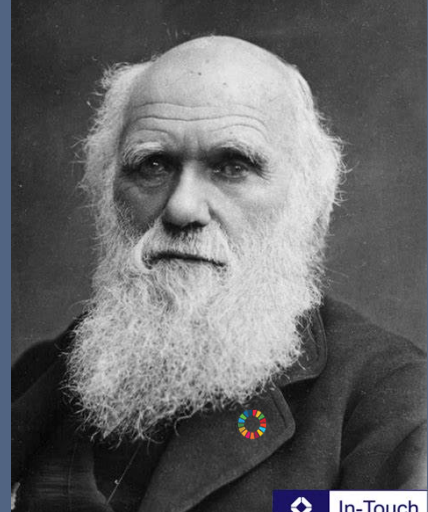


Adapt to change, or die

“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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ISO standards update: Asset & Facility Management and the Sustainable Development Goals

Stephen.Ballesty@in-touchadvisory.com



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