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Facility Management – Del 2: Vägledning för upprättande av överenskommelser (ISO 41012:2017)

**Facility management – Guidance on strategic sourcing and the
development of agreements (ISO 41012:2017)**

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The European Standard EN ISO 41012:2018 has the status of a Swedish Standard. This document contains the official version of EN ISO 41012:2018.

This standard supersedes the SS-EN 15221-2:2006, edition 1 and SS-EN 15221-2:2006, edition 1

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EUROPEAN STANDARD

EN ISO 41012

NORME EUROPÉENNE

EUROPÄISCHE NORM

June 2018

ICS 03.080.10

Supersedes EN 15221-2:2006

English Version

Facility management - Guidance on strategic sourcing and the development of agreements (ISO 41012:2017)

Facility management - Directives sur le
procédé d'approvisionnement stratégique et
d'élaboration des accords (ISO 41012:2017)

Facility Management - Leitfaden zur
strategischen Beschaffung und der Entwicklung
von Vereinbarungen (ISO 41012:2017)

This European Standard was approved by CEN on 6 April 2018.

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European foreword

The text of ISO 41012:2017 has been prepared by Technical Committee ISO/TC 267 “Facility management” of the International Organization for Standardization (ISO) and has been taken over as EN ISO 41012:2018 by Technical Committee CEN/TC 348 “Facility Management” the secretariat of which is held by NEN.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by December 2018, and conflicting national standards shall be withdrawn at the latest by December 2018.

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Endorsement notice

The text of ISO 41012:2017 has been approved by CEN as EN ISO 41012:2018 without any modification.

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 identify and select the most appropriate options for the design, sourcing and delivery of FM. This document provides step-by-step guidance on the overall strategic sourcing process and on how to prepare and implement adequate internal or external FM agreements.

This document also provides guidance on:

- types of agreements;
- development, structure and contents of agreements;
- 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 of 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 national rules and regulations, and are based on a generic platform.

This document is primarily written for complex in-house or externally procured services, and might need to be scaled down if used for smaller projects. 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.

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:

- 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 apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <http://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

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.