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Underhåll – Riktlinjer för framtagande av underhållsavtal

Maintenance – Guideline on preparation of maintenance contracts

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Denna standard ersätter SS-EN 13269:2006, utgåva 1.

The European Standard EN 13269:2016 has the status of a Swedish Standard. This document contains the official English version of EN 13269:2016.

This standard supersedes the Swedish Standard SS-EN 13269:2006, edition 1.

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EUROPEAN STANDARD

EN 13269

NORME EUROPÉENNE

EUROPÄISCHE NORM

May 2016

ICS 03.080.10

Supersedes EN 13269:2006

English Version

Maintenance - Guideline on preparation of maintenance contracts

Maintenance - Lignes directrices pour la préparation des contrats de maintenance

Instandhaltung - Anleitung zur Erstellung von Instandhaltungsverträgen

This European Standard was approved by CEN on 23 March 2016.

CEN members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration. Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CEN member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CEN member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

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EUROPEAN COMMITTEE FOR STANDARDIZATION
COMITÉ EUROPÉEN DE NORMALISATION
EUROPÄISCHES KOMITEE FÜR NORMUNG

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European foreword

This document (EN 13269:2016) has been prepared by Technical Committee CEN/TC 319 “Maintenance”, the secretariat of which is held by UNI.

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of an identical text or by endorsement, at the latest by November 2016 and conflicting national standards shall be withdrawn at the latest by November 2016.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN [and/or CENELEC] shall not be held responsible for identifying any or all such patent rights.

This document supersedes EN 13269:2006.

In comparison with the previous edition, the following significant changes have been made:

- further clarification is given in the Scope about its possible use;
- the following subclauses have been added to Table 1:
 - 5.3 Table of contents;
 - 5.5 Contractual documents (moved from 5.9.7);
 - 5.7.7 Assessment of capabilities of the candidate as maintenance service provider;
 - 5.7.8 Assessment of competences of personnel involved in the tasks;
 - 5.7.9 Equipment provided by the maintenance service provider;
- a Bibliography has been added;
- the document has been improved editorially.

According to the CEN-CENELEC Internal Regulations, the national standards organizations of the following countries are bound to implement this European Standard: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

Introduction

The value of maintenance to the owners of items (as defined in EN 13306) cannot be overemphasized. Proper maintenance protects the value of the capital invested and ensures that the required availability is attained.

In addition, as technical and economic developments increase, the demand for contracted maintenance services both nationally and across borders also increases.

It is therefore important that maintenance contracts be approached in a structured and careful manner.

The purposes of this European Standard are

- to promote cross-border company/maintenance contractor relationships and to produce a clear interface between the company and the maintenance contractor for maintenance services,
- to improve the quality of maintenance contracts so that disputes and adjustments are minimized,
- to draw attention to the scope of maintenance services and to identify options for their provision,
- to give assistance in, and advice on, the drafting and negotiation of maintenance contracts and in specifying arrangements in the case of dispute,
- to identify types of maintenance contracts and to make recommendations for the attribution of rights and obligations between the parties of the contract including risks,
- to simplify comparison between maintenance contracts.

Moreover, this European Standard promotes to qualify all the involved competences, that is

- personnel, to whom it is required to increase competences, defined as knowledge, experiences and personal, social and / or methodological capacities;
- organizations, including those that have to require, offer or control the outsourcing maintenance activities, that need to improve effectiveness of their operation processes.

This European Standard also could facilitate in specifying the required output of maintenance activities.

This European Standard is intended for parties who wish to draw up a maintenance contract. It offers headings which are not exhaustive and which parties may or may not include, exclude, modify and adapt to their own contractual relationship.

It does not bind the parties to use any part of this European Standard.

Not all the clauses discussed in the guideline will be applicable to every contract.

Each individual contract should be drafted, and negotiated where appropriate, to take into account the requirements arising from the work required on the items to be maintained, the parties involved and any applicable laws and regulations.

This European Standard contains the following clauses to assist the user:

- Clause 4 “Maintenance activities and stages to the maintenance contract” gives a structured overview of possible maintenance services offered or required. Its purpose is to give advice on activities which may be required in preparing a contract and prior to signing of agreements and also those activities which may be required during the period of any contract;
- Clause 5 “Proposed contract structure and content”, provides a standard checklist for use when drafting maintenance contracts together with important elements for content.

When using this European Standard, a three-step approach should be followed:

- Step 1: The company should decide which maintenance services will be provided in-house and which services will be contracted out; i.e. which maintenance services should be bought from a maintenance contractor and therefore be subject to a maintenance contract;
- Step 2: A pre-qualification stage follows any decision to contract out part or all of any maintenance and it is during this period that the company will identify any contractor or contractors with the capability of performing the required maintenance tasks;
- Step 3: The contract can be prepared using the guidance in this European Standard and the maintenance contractor selected either by price negotiation or by competitive tender.

1 Scope

This European Standard provides guidance on the preparation of contracts in private sector for maintenance services.

It can be applied to:

- cross-border as well as national company/maintenance contractor relationships,
- the whole range of maintenance services including planning, management and control in addition to maintenance operations,
- every type of item with the exception of computer software unless the software has to be maintained as an integral part of, and together with, technical equipment.

It does not

- provide standard forms for maintenance contracts,
- determine rights and obligations between company and maintenance contractor,
- provide rules for agreements with public administrations.

NOTE It is common to have service-level-agreements with different models, including consulting, engineering, improvements and optimization with incentives. It is out of the scope of this standard to consider characteristics of these agreements.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

EN 13306, *Maintenance — Maintenance terminology*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in EN 13306 and the following apply.

3.1

maintenance contractor

contracting party (e.g. organization, joint venture, etc.) that has agreed to undertake responsibility for providing a given maintenance service and obtaining, when specified, supplies in accordance with a contract

Note 1 to entry: This can include the provision of a consultancy service.

3.2

company

customer or recipient of a maintenance service provided by the maintenance contractor

3.3

maintenance location

place at which a maintenance task has to be performed

Note 1 to entry: In case of remote maintenance, the contractor's location from which the operation proceeds.

3.4 maintenance task

range of elementary maintenance activity carried out for a given purpose

EXAMPLE Examples are replacement and repair.

3.5 operation location

area within defined boundaries where the item to be maintained is required to function

3.6 sub-contractor

organization appointed either by party of the contract and responsible to the maintenance contractor for carrying out such work or by services that enable the main contract to be fulfilled

4 Maintenance activities and stages to the maintenance contract

4.1 General

Activities can be broadly divided into those required prior to the signing of the contract and those required after it has been signed.

4.2 Pre-contract activities

Pre-contract activities consist of actions, which are required prior to preparing, and in order to prepare, a contract.

Such activities can comprise the following:

- identifying the maintenance service required;
- preparing a maintenance policy and a strategy for its implementation;
- making a decision on whether to provide the maintenance service in-house or to contract it out;
- deciding the type of maintenance contract which may be appropriate and preparing the required specification;
- identifying maintenance contractors who are capable of carrying out the tasks required;
- assessing the competences of the candidate as maintenance contractors and the competences of its personnel that will be involved in the contract;
- preparing the contract;
- calling for tender and/or negotiating a price;
- evaluating the returned tenders received and selecting the successful maintenance contractor.

4.3 Contract activities

Contract activities consist of those actions to be carried out by the maintenance contractor and those, which will be carried out by the company after the contract has been signed.

There should be adequate liaison between each party to ensure the smooth running of the contract.