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**To the Members of
ISO/PC 251
Asset Management**

Communiqué on the 2nd meeting of ISO/PC 251 Asset management, 10 to 14 October 2011, Arlington, Virginia, USA

Delegates to the meeting   **The Westin Hotel**   **The American Trucking Association**

ISO/PC 251 held its first meeting in February/March 2011. Following that meeting 2nd Working Drafts of its three standards had been released for review.

ISO/WD2 55000 *Asset management – Overview, principles and terminology* received approximately 770 individual comments; ISO/WD2 55001 *Asset management – Management systems – Requirements* received approximately 450 individual comments; and ISO/WD2 55002 *Asset management – Management systems - Guidelines on the application of ISO 55001* received approximately 150 comments.

The primary purpose of the meeting was to revise the drafts and to improve the texts to a point where they would be ready for circulation as formal Committee Drafts.

One of the initial concerns raised in some comments was that it might not be possible to continue to develop ISO 55002 in parallel with ISO 55001, and that it might be better to delay it until after the ISO 55001 text had been established.

The meeting started with the unexpected news that the Chairman, Mr Rhys Davies, would not be able to attend, owing to an emergency family situation. However, through the use of ISO's webinar system, he was able to participate remotely for part of the meetings.

To manage the meetings, the secretariat proposed Mr David McKeown (UK) to be the Acting Chairman, and was grateful that his nomination was accepted.

Prior to the meeting, a number of analyses of the comments had been prepared. These identified five key issues on which there was a need to reach high level agreement:

— The scope of the standards (were they truly generic in addressing all types of asset, or were they actually limited to "physical" assets)
— The "line of sight" in the standards (i.e. the linkages between strategy, policy, and objectives) needed clarification
— The "life cycle" of assets, and particularly the period for which an organization has a responsibility for them, needed clarification
— The confusion between terms such as "asset management system" and "a management system for asset management" (or an "asset management-management system")
— The need to include reference to financial issues within the standards

In order to have collective discussions on these issues the meeting went into an "Open Forum" session following the opening plenary on Monday the 10th of October, to allow all delegates to contribute to the discussions, rather than be limited to just delegation leaders speaking (as occurs in plenary).

The Chairman and Conveners had requested specific delegates to prepare presentations on these issues, and they in turn had called on other experts to support them. Consequently the rest of the Monday was spent in listening to the presentations and in discussing them

Following the presentations, the Acting Chairman concluded that there seemed to be general agreement that::

— The issues of the "life cycle" of assets, and of "asset management system" versus "management system for asset management" should be worked on by the Working Groups
— A task team should be established to look at financial issues for all the standards
— The issues of Scope and "line of sight" should be reviewed at an Open Forum session the following morning, as this would give everyone a chance to think over what they had heard that afternoon.

The following morning the Open Forum session received further presentations on the issues of Scope and "line of sight". The discussions led to general agreement that the Scope of the standards should seek to be generic and applicable to all asset types, and that it would be the decision of the user organization to define the type of assets it would wish to apply its management system to. Concerns were raised by some members however, who felt that in trying to address intangible assets, the standards risked becoming unusable. On the line of sight issue, a very useful suggestion was received to align the "table of contents" between ISO 55001 and ISO 55002, and to ensure that any requirements/guidance given in those two standards would be traceable to concepts documented in ISO 55000.

Following this Open Forum session, the Working Groups started their activities, and subdivided into task teams as necessary to deal with specific clauses and issues.

A brief updating Open Forum session was held late on the Wednesday afternoon to check on progress in the two Working Groups. On the issue of "asset management system" it was proposed that each standard should clearly separate issues for "assets" from "asset management" from "asset management systems"; this was well received. In addition, reports were received on how the work on terminology was progressing in WG1 and on how the task team dealing with financial issues was progressing.

On the Thursday and Friday mornings the Working Groups continued their work, before a final Open Forum was called to receive the WGs closing reports in advance of the PC's closing plenary. The reports indicated that extremely good progress had been made on all

three standards, and that they were ready to go forward as Committee Drafts (for comment only), following final editing.

Members raised concerns about the transparency of the editing processes that would follow the meeting before the drafts would be circulated out as Committee Drafts, so it was agreed to send copies of each stage of the drafts to the delegates who had attended the meeting.

The closing plenary meeting noted the earlier presentations of the Working Group reports, and adopted all proposed resolutions unanimously. The fact that the resolution moving ISO 55002 to the Committee Draft stage had been accepted unanimously, seems to indicate that the concerns expressed in the comments about needing a delayed development process for this standard had been addressed.

The closing plenary also received a video presentation on behalf of the South African Bureau of Standards (SABS) concerning the next meeting planned for 6 to 10 February 2012. Finally, the Secretary asked members to celebrate the fact that the 14th of October is World Standards Day, before presenting this year's theme of "Creating confidence globally".

Overall, the meeting achieved its aim of producing Committee Drafts, following the resolution of some very difficult issues, through some exceptional hard work by the delegates.

This would not have been possible without the magnificent support we received from our hosts, ANSI, ASTM E53 and the US TAG to PC 251, and the generous sponsorship from the US Department of Veterans Affairs, Association for Maintenance, Boeing, DynCorp International LLC, GP Consultants LLC, Meridium, NASASP, NPMA, SKF USA Inc., Sunflower Systems, Uptime Magazine, Vesta Partners, UMS Group. The facilities at the Westin Arlington Gateway hotel and at the American Trucking Association's offices were first rate, and the sponsored tea breaks, lunches, cocktail reception and banquet were very gratefully received.

We would particularly like to recognize the work of Jim Dieter and Lyle Hestermann in organizing the meeting, and to send our best wishes for a speedy recovery to Lyle (who was struck down with an illness just before the meeting and could not attend).

We would also like to thank David McKeown for taking on the role of Acting Chairman at short notice and for his excellent performance in the job.

Finally a huge thanks to the support team of Jessica Dzara, Christi Sierk, Betsy Tucker, Valerie Rovine, Lana El Eryan and Meghan Maguire, who brought it all together for us.

Valerie, Betsy, Jessica, Lana   **Christi**   **Meghan**

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