Section: Context of the Organization

Task 1: We determine the strategic issues that affect our ability to improve energy performance and achieve the goals of our 50001 Ready energy management system.

Getting It Done

1. Identify the external and internal strategic issues that affect your organization's ability to improve its energy performance and achieve the intended outcomes of the energy management system (EnMS).
2. Record this information.

Task Overview

In this task, you develop information to ensure your energy management activities support your organization's foundational needs, allowing you to more fully customize your energy management system (EnMS) to your business realities.

Understanding your organization's overall strategic goals and objectives enables you to look broadly at what strategic issues may affect the EnMS. This information influences the design of the EnMS and ensures that it is more closely aligned with existing strategic priorities and direction. This, in turn, facilitates the successful integration of the EnMS into your organization's existing business processes.

The information to be developed involves identifying, from a strategic perspective, the external and internal issues that may affect your organization's ability to improve its energy performance or to achieve the intended outcomes of the EnMS. The intended outcomes of the EnMS are (or will be) what your organization plans to achieve by implementing its EnMS, such as reducing energy costs. Strategic issues can have a positive or negative impact on the EnMS.

The outputs of this process will be used in Task 7 Risks to EnMS Success to determine the risks and opportunities that need to be addressed by your EnMS.

This guidance is relevant to Section 4.1 of the ISO 50001:2018 standard.

Associated Resources	Short Description
no resources for this questions	

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Full Description

Determine the strategic external and internal issues that may affect your organization's ability to improve energy performance and achieve the intended outcomes of your EnMS

To determine strategic issues that may affect your organization's ability to improve its energy performance and achieve the intended outcomes of the EnMS, information about the organization's strategic objectives and challenges are needed. This information may have already been identified as part of the organization's strategic or long-term planning process. Having management input into the determination of the relevant issues is desirable, not only to expedite the process but also to show management that the EnMS considers strategic issues facing the organization. However, it is not unusual for management to not be involved in this process and for the energy team to develop this information on its own. In this case the information should be presented to top management for their review and input. This approach presumes that the energy team has access to the relevant information about the organization's strategic direction, goals, and challenges.

Examples of strategic external issues may include:

- Economic and financial conditions
- Competitive circumstances
- Legal and regulatory requirements
- Technological developments
- Political, social, and cultural conditions
- Restrictions on energy supply

Examples of strategic internal issues may include:

- Core business objectives and strategies
- Governance and organizational structure
- Information flows and decision-making processes
- Organizational culture and knowledge
- Organizational policies
- Financial resources
- Technological maturity

In performing this task, keep in mind that the relevant issues are those that may affect your organization's ability to achieve the intended outcomes of your EnMS and energy performance improvement.

The Playbook worksheet is for your optional use. As with most of the optional Playbook worksheets in the Navigator, you can adopt this resource for your EnMS or simply use it to generate ideas on how you may want to capture the information generated by this task.

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