Section: Context of the Organization

Task 3: We have documented and approved the scope and boundaries of our 50001 Ready energy management system.

Getting It Done

1. Consider the strategic issues and requirements identified as part of Task 1 An EnMS and Your Organization to determine the scope and boundaries of the energy management system (EnMS).
2. Develop and document an EnMS Scope and Boundaries Statement.

Task Overview

The scope and boundaries enable your organization to focus efforts and resources by defining what the EnMS includes. The scope identifies the set of activities that are included in the energy management system (EnMS), while the boundaries are the physical or organizational limits of the EnMS, commonly referred to as the "fence line" of your site. The boundaries do not have to be fixed in a physical space and could be established around a fleet of vehicles or other transportation equipment.

In the 50001 Ready Navigator the term site is used and carries the same meaning as other terms that describe the physical definitions of a space such as facility, complex, location, and campus so long as there is a relative physical proximity to the assets that will be included within the EnMS.

When determining the scope and boundaries strategic issues and requirements determined as part of Task 1 An EnMS and Your Organization should be considered. In addition, you should ensure that your organization has the authority to control all energy uses within the scope and boundaries, and that no energy-using equipment or systems are excluded unless they are separately metered or a dependable calculation can be made. Once the scope and boundaries are defined, an organization cannot exclude any energy sources that cross or are within the defined boundaries of the EnMS.

EnMS scope and boundaries could include any combination of physical structures: the building management operations of one or more commercial buildings at one or more specific locations; the manufacturing, warehousing, and distribution activities at a particular plant; or multiple sites of a corporation at multiple sites, to name just a few. In many cases, the scope and boundaries may only include one building or site. Top management must ensure the organization's scope and boundaries are established.

This guidance is relevant to Section 4.3 of the ISO 50001:2018 standard.

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Associated Resources Short Description

no resources for this questions

Full Description

Scope and boundaries - Where to start

While the scope and boundaries of an energy management system (EnMS) are different concepts, they are highly related and iteration between the two concepts will yield the best results. You can choose to start by establishing either the scope or the boundaries first, and then establish the other. The guidance below will pose a set of questions that will help establish the scope and boundaries together, focusing on the scope first.

Before starting on this task, consider gathering some of the following resources within your organization. These can be useful in determining the scope and boundaries of the EnMS.

- Organization chart
- Site map or site plan
- Site photographs
- List of on-site contractors and related operations
- Site/building layout
- Process layouts/maps
- Process flow diagrams
- Utilities drawings
- Site/building energy consumption data
- Equipment energy consumption data

Scope: Identify the set of activities to be included in your EnMS

Consider these questions when defining the set of activities to be included or excluded in the scope of EnMS. These questions will also help inform your subsequent process to establish boundaries. The Playbook worksheet can be used to help you formulate the scope.

- Is there an area for which you do not have energy information?
- Is there an area where you cannot obtain employee involvement or participation?
- Are there areas that have a different management team or decision structure?
- Do you have a building or location that you are not including?
    - Can you isolate the energy consumption of those locations?
- Do you have the authority to control your organization’s energy optimization, energy use and energy consumption?

Additionally, the EnMS scope should reflect the strategic internal and external issues and requirements that were identified as part of Task 1 An EnMS and Your Organization.

- Do any of the identified internal or external issues have implications or consequences that need to

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be considered as related to the scope of the EnMS?
- Do any of the interested parties' requirements affect what is included or not included within the EnMS?

Boundaries: Define the physical or organizational limits of your EnMS

Now that you have considered the set of activities to be included in the scope of your EnMS, what are the physical implications of your decision? In many cases this could be as simple as the fence line of your site. How would they be translated into a statement of the boundaries of your EnMS?

Consider your answers to these questions when defining the boundaries of your EnMS. The Playbook worksheet can be used to help formulate the boundaries to be defined in the statement.

- What are the physical or organizational limitations of the areas that are included?
- What are the physical or organizational limitations of the areas that are not included?
- How do the areas that are included and not included compare to the site map or site plan?
- Do you have the authority to control your organization's energy use and energy consumption within the proposed boundaries?

Scope and boundaries statement

The optional Playbook worksheet can be used to formalize a statement of scope and boundaries. The statement of the EnMS scope and boundaries can be a stand-alone document or included within an energy manual, which is not required, but which many organizations find useful as a "road map" to their EnMS. Top management is responsible for ensuring that a scope and boundaries statement has been established, so make sure to review the finalized document with them.

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