EESTI STANDARD EVS-ISO 21504:2023

PROJEKTI-, PROGRAMMI- JA PORTFELLIJUHTIMINE
Portfellijuhtimise juhised

Project, programme and portfolio management
Guidance on portfolio management
(ISO 21504:2022, identical)

EESTI STANDARDI EESSÕNA	NATIONAL FOREWORD
See Eesti standard EVS-ISO 21504:2023 sisaldab rahvusvahelise standardi ISO 21504:2022 „Project, programme and portfolio management. Guidance on portfolio management“ identset ingliskeelset teksti.	This Estonian Standard EVS-ISO 21504:2023 consists of the identical English text of the International Standard ISO 21504:2022 „Project, programme and portfolio management. Guidance on portfolio management“.
Ettepaneku rahvusvahelise standardi ümbertrüki meetodil ülevõtuks on esitanud Eesti Projektijuhtimise Assotsiatsioon, standardi avaldamist on korraldanud Eesti Standardimis- ja Akrediteerimiskeskus.	Proposal to adopt the International Standard by reprint method has been presented by Estonian Project Management Association, the Estonian Standard has been published by the Estonian Centre for Standardisation and Accreditation.
Standard EVS-ISO 21504:2023 on jõustunud sellekohase teate avaldamisega EVS Teatajas.	Standard EVS-ISO 21504:2023 has been endorsed with a notification published in the official bulletin of the Estonian Centre for Standardisation and Accreditation.
Standard on kättesaadav Eesti Standardimis- ja Akrediteerimiskeskusest.	This standard is available from the Estonian Centre for Standardisation and Accreditation.

Käsitlusala

See dokument annab juhised projektide ja programmide portfelli juhtimise põhimõtete kohta. See dokument on asjakohane igat tüüpi, sealhulgas avaliku või erasektori, igasuguse suurusega või mis tahes sektorisse kuuluvate organisatsioonide jaoks.

Selles dokumendis esitatud juhised on mõeldud kohandamiseks, et need sobiks iga projekti- ja programmiportfelli eriomase keskkonnaga.

See dokument ei anna juhiseid projektijuhtimise, programmijuhtimise ega muude eriomaste portfellijuhtimise tüüpide (nagu nt finantsportfelli juhtimise) kohta.

Tagasisidet standadi sisu kohta on võimalik edastada, kasutades EVS-i veebilehel asuvat tagasiside vormi või saates e-kirja meiliaadressile standardiosakond@evs.ee.

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 258, *Project, programme and portfolio management*.

This second edition cancels and replaces the first edition (ISO 21504:2015), which has been technically revised. The main changes are as follows:

— terms and definitions, figures and the text have been aligned with ISO 21500:2021 and ISO 21502:2020.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

This document provides guidance on the principles of project and programme portfolio management. Typically, management of a project and programme portfolio supports the organizational strategies to deliver value.

This document is intended to be used by:

a) executives and senior managers responsible for setting and implementing organizational strategy and business planning;

b) decision-makers responsible for selecting, authorizing and governing projects, programmes and portfolios;

c) teams and individuals responsible for implementing and managing the project and programme portfolios;

d) project and programme managers and other stakeholders.

Project, programme and portfolio management — Guidance on portfolio management

1 Scope

This document gives guidance on the principles of project and programme portfolio management. This document is relevant to any type of organization including public or private and any size organization or sector.

The guidance presented in this document is intended to be adapted to suit the specific environment of each project and programme portfolio.

This document does not provide guidance on project management, programme management, or other specific types of portfolio management (such as financial portfolio management).

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

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

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
baseline
reference basis for comparison against which performance is monitored and controlled

[SOURCE: ISO/TR 21506:2018, 3.5]

3.2
benefit
created advantage, value or other positive effect

[SOURCE: ISO/TR 21506:2018, 3.6]

3.3
governance
principles, policies and framework by which an organization is directed and controlled

[SOURCE: ISO/TR 21506:2018, 3.25]

3.4
governing body
person, group or entity accountable for the *governance* (3.3) of an organization, organizations or a part of an organization

[SOURCE: ISO/TR 21506:2018, 3.26]