

# QMS Procedure

Organizational Context







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## Organizational Context

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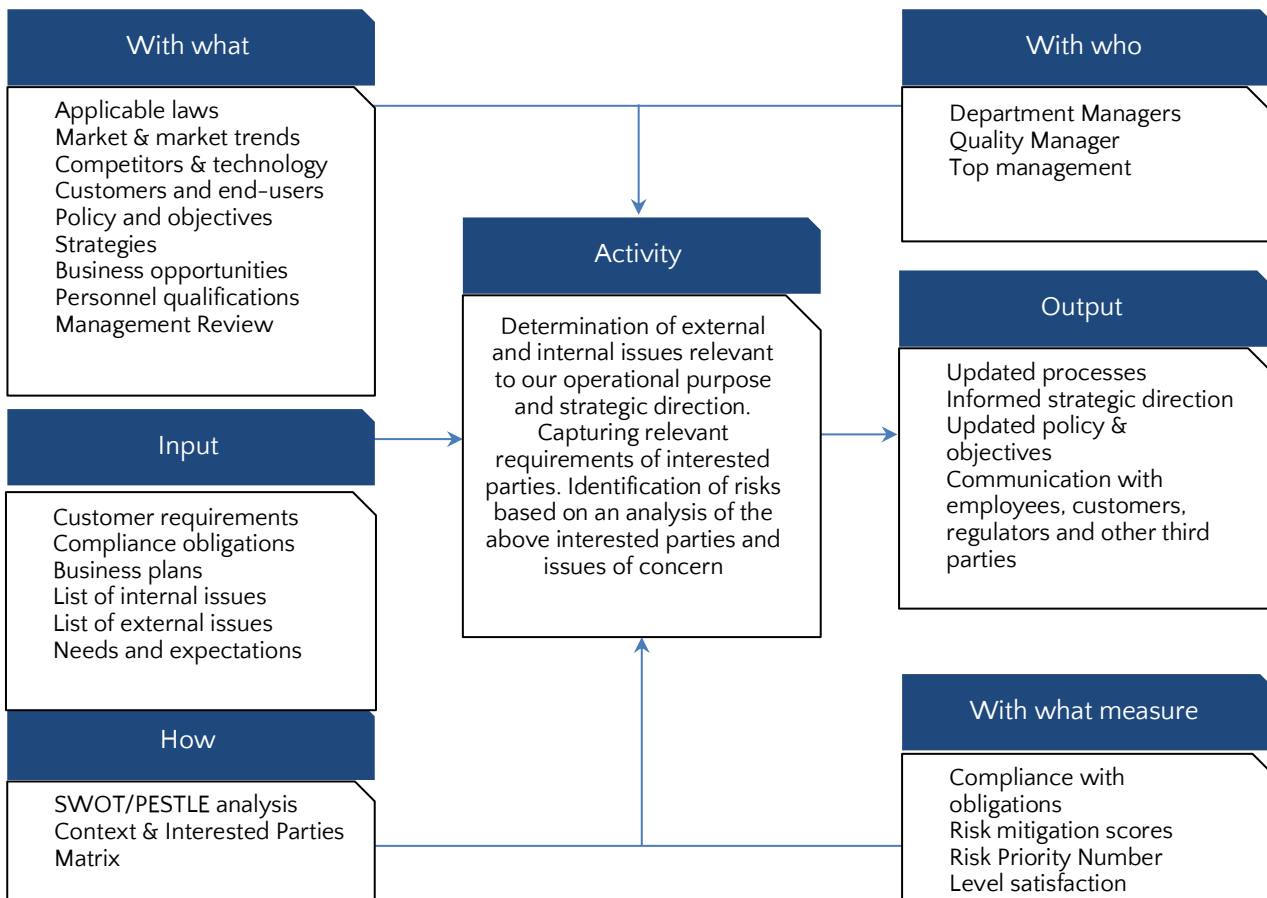
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# 1 Organizational Context

## 1.1 Introduction & Purpose

The purpose of this procedure is to outline Future Energy Partners' process of identification and determination of the internal and external context of the business, as well as the needs and expectations of interested parties that relate to our Quality Management System and which influence our strategic direction (where we're going) and our operational purpose (what we make and do).

### 1.1.1 Process Turtle Diagram



### 1.1.2 References

Standard	Title	ISO Clauses	Manual Sections
BS EN ISO 9001:2015	Quality Management Systems	4.1, 4.2, 4.3	4.1, 4.2, 4.3

### 1.1.3 Terms & Definitions

Term	Definition
Interested party	Stakeholder that can affect, be affected by, or perceive itself to be affected by a decision or activity

Term	Definition
Context	combination of internal and external issues that can have an effect on an organization's approach to developing and achieving its objectives

## 1.2 Application & Scope

This procedure has been developed to assist in meeting the requirements of Clause 4.0 of ISO 9001:2015. As a prerequisite for risk-based thinking and evidence-based decision making, defining the levels of risk and criteria Future Energy Partners' related to its internal and external contextual issues that include but are not limited to information on:

1. Applicable laws;
2. Market and market trends;
3. Competitors including technology;
4. Customers and end users;
5. Policy, objectives, strategies;
6. Promising business opportunities;
7. Personnel qualifications;
8. Management review inputs.

## 1.3 Organizational Context

Future Energy Partners' approach to planning the Quality management system comprises a set of iterative steps as described below. The process is underpinned by the traditional SWOT and PESTLE analysis methodology, which provides a proven and useful tool for identifying and analysing the strengths, weaknesses, opportunities and threats applicable to the environment in which our organization operates.

Only those issues that are relevant to our organization's operational purpose and strategic direction; and which affect, or have the potential to affect, our ability to achieve our objectives are considered. Once the SWOT and PESTLE analyses are completed, we prioritize the top four or five items in each section, based upon:

1. What must be addressed immediately?
2. What can be handled now?
3. What needs researching further?

Develop and document:

1. Realistic strategies to address each item;
2. Resources required – human and costs, if known.

Strategic risk and opportunity identification involves the relationship between Future Energy Partners' and the broader, environment and community. A range of issues is considered when examining our strategic context:

1. Key thrusts of stakeholder strategies;
2. Opportunities and threats associated with the local, regional, and global economic, social, political, cultural, environmental, regulatory and competitive environments;
3. Strengths and weaknesses of the organization in attaining corporate objectives.

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Establishing the external context is important to ensure that stakeholders and their objectives are considered when developing risk management criteria and that externally generated threats and opportunities are properly taken into account.

Operational risk and opportunity identification involves gaining an understanding of our organization's capabilities, goals, objectives, strengths and weaknesses by considering:

1. Organizational structure and culture;
2. The identity and nature of interaction with key stakeholders;
3. The existence of any operational constraints;
4. Objectives and key performance indicators;
5. Business resilience vulnerabilities and management systems.
6. Relevant issues relating to recent change management risk, performance or audit reviews;
7. Regulatory and contractual requirements and constraints.

A review of the information is conducted at a minimum of once a year, and ideally just prior to commencing the planning of new processes and products.

### 1.3.1 Internal Issues

The internal context considers the values, culture, knowledge and performance of our organization. Internal issues are initially captured using the *Quality Context & Interested Parties* matrix. Where required, further understanding of these issues is acquired by SWOT analysis. Using the *SWOT Analysis Template* Future Energy Partners identifies and analyses our strengths, weaknesses, opportunities and threats.

#### 1.3.1.1 Strengths

Strengths are characteristics of our organization that allow operation more efficiently and effectively than competitors. We consider:

1. What does our organization do well?
2. What advantages does our business have over other internal sections or external organizations, including competitors?
3. What makes our organization different from competitors?

#### 1.3.1.2 Weaknesses

Weaknesses are areas that are recognized as needing improvement. We consider:

1. What can be done better?
2. What causes problems or complaints (information from root cause analysis)?
3. Which capabilities need modifying, strengthening or divesting for the future?

#### 1.3.1.3 Opportunities

Opportunities are trends, circumstances or business opportunities that may be taken advantage of. We consider:

1. What are the changes in technology or markets?
2. What local and global events may be useful?
3. What are the changes in customer/societal values?

#### 1.3.1.4 Threats

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Threats can be external or internal and are anything that can adversely affect business or operations. External threats could be economic, new legislation or even a new competitor in the market. Internal threats could be a skill or staff shortage within our organization. We consider:

1. What obstacles are there for ongoing operation?
2. Are there any potential competitors to the business?
3. Who might be the new competition?
4. Are there any potential changes to staffing, products, services or technology that could threaten operation or business?

### 1.3.2 External Issues

Establishing external contextual issues is important to ensure that stakeholders and their objectives are considered when developing risk management criteria and that externally generated threats and opportunities are properly taken into account.

External issues are initially captured using the *Quality Context & Interested Parties* matrix. Where required, further understanding of these issues is acquired by PESTLE analysis. Using the *PESTLE Analysis Template* Future Energy Partners identifies and analyses external context issues from local, regional, national and international perspectives.

#### 1.3.2.1 Political

What is happening politically in the environment in which we operate?

1. Trading policies;
2. Funding, grants and initiatives;
3. Home market lobbying/pressure groups;
4. International pressure groups;
5. Wars and conflict;
6. Government policies, term and change;
7. Inter-country relationships and attitudes;
8. Political trends;
9. Internal political issues;
10. Shareholder needs and demands.

#### 1.3.2.2 Environmental

What is happening with respect to ecological and environmental issues?

1. General market conditions that affect the business;
2. Market direction;
3. Environmental issues;
4. Stakeholder/investor values;
5. Needs for the organization's products and services in the market;
6. Customer market technology opportunities;
7. Competitors and differences between competitors;
8. Competitiveness of the organization and what affects its ability to compete;
9. Customer problems and complaints with current products and services.

#### 1.3.2.3 Technological

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What is happening technology-wise which can impact what we do?

1. Maturation of existing technologies;
2. Technological developments or trends that affect or could affect the business;
3. New product development and potential markets: government, international, resource sector, etc.;
4. Productivity improvements through automation;
5. Telecommunication infrastructure;
6. Online connectivity and digital data.

### 1.3.2.4 Social/Cultural

What is occurring socially in the markets in which we operate?

1. Current or emerging trends in lifestyle and their implications;
2. Demographic trends that may affect market size (growth rate, income, population shifts);
3. Whether these trends represent an opportunity or a threat;
4. Changes in consumer behaviour;
5. Increasing environmental awareness;
6. Urbanization;
7. Consumer demands; personalization and high-end experiences;
8. Public demand for transparency and participation in decision-making.

### 1.3.2.5 Legislative

What is happening with changes to legislation?

1. Possible changes in regulation/legislation;
2. Impacts of these changes on business;
3. Stability of government;
4. Outsourcing regulations;
5. Government bureaucracy – rules and regulations;
6. Legal constraints.

### 1.3.2.6 Economic

What is happening within the economy?

1. National and internal financial trends (trends in economic forces);
2. Economic trends that may have an impact on business activity;
3. Emerging markets;
4. Inflation, employment levels, supply;
5. Energy available;
6. Global financial situation.

## 1.4 Interested Party Requirements

Some needs and expectations relating to our interested parties are mandatory; for example, because they have been incorporated into laws and regulations. Our organization may also decide to voluntarily agree to, or adopt, other needs and expectations (e.g. subscribing to a voluntary initiatives).

Once our organization adopts them, they are addressed when planning and establishing the quality management system.

### 1.4.1 Identifying Interested Party Requirements

The needs and expectation of interested parties are initially captured using the *Quality Context & Interested Parties* matrix. Using this template, the respective Departmental Managers identify and list the needs and expectations of any interested parties in relation with their department that may have potential impact on the achievement of Future Energy Partners’ objectives and policy, the conformity of our products, services and our management system.

Each Departmental Manager in conjunction with the CEO ranks the interested parties according to their degree of Priority and their Relevance (1 low, 4 high) to current objectives, policies and conformity of products and services. The spreadsheet multiplies these scores to generate an overall Power score that represents the Risk Priority Number (RPN) that is used to prioritize the adoption of any relevant need or expectation.

1. **Relevance** – effects upon organizational activities;
2. **Priority** – effects on decisions the organization makes;
3. **Power** – combined effects of influence the interested party has (Risk Priority Number RPN).

### 1.4.2 Interested Party Scoring Matrix

<b>Power</b> ( <i>Effects of influence</i> ) = Priority x Relevance		<b>Priority</b> of Interested Party ( <i>Effects on decisions</i> )			
		No importance	Minor importance	Some importance	Major importance
<b>Relevance</b> of Interested Party ( <i>Effects on activities</i> )	Not relevant	1	2	3	4
	Minor relevance	2	4	6	8
	Influential	3	6	9	12
	Significantly relevant	4	8	12	16

### 1.4.3 Action Matrix

<b>Score</b>	<b>Power</b> of Interested Party ( <i>Effects on decisions</i> )		
	Description	Strategy	Objectives
1 to 3	Low relevance with low importance	Monitor interest	Detect opportunities from growing interest
4 to 6	Low relevance with high importance	Keep satisfied	Build interest, monitor for changes
7 to 11	High relevance with low importance	Keep informed	Maintain interest, monitor for changes
12 to 16	High relevance with high importance	Manage closely	Maintain support, monitor for changes

Based on the scoring output, each Departmental Manager in conjunction with the Quality Manager considers, develops and implements the handling approaches, defined in the table above, to manage and comply with the needs and expectations of our interested parties.

The Quality Context & Interested Parties matrix is submitted to Top management for discussion, review and acceptance for incorporation into the Quality Management System via addition to our scope, or incorporation into customer requirements, operational activities, process controls, risk and opportunity registers, and compliance obligation and legal registers.

### 1.4.4 Monitoring and Review

Each Departmental Manager in conjunction with the Quality Manager are responsible for the reassessment of their relevant interested parties. Reassessment is conducted on need-to-do basis, it includes:

1. Identifying new parties;
2. Reassessing each parties' requirement(s) and compliance status;
3. Adjusting mitigation plans or developing new mitigation plans;
4. Adjusting schedule and budgets, if applicable.

Each Departmental Manager consults relevant members of Top management for any change on mitigation action to manage and whenever applicable to fulfil the needs and expectations of interested parties. The effectiveness of mitigation action is monitored, evaluated and reviewed.

## 1.5 Process Matrix & Application

### 1.5.1 Process Matrix

Future Energy Partners uses the Process Matrix worksheet to align the clauses and requirements of ISO 9001:2015, to the processes within our organization. It provides a convenient overview of the management system processes and helps to define the sequence and interaction of processes.

The Quality Manager and Top management are responsible for ensuring the Process Matrix worksheet is prepared, reviewed and kept up-to-date.

### 1.5.2 Process Application

Future Energy Partners uses the Process Application worksheet to assign requirements to relevant functions, processes, departments and teams to show how our organization establishes, implements, maintains and continually improves its management system, its processes and their interactions, in accordance with the requirements of ISO 9001:2015.

The completed Process Matrix & Application workbook the basis for programming internal audits as well as becoming a roadmap to the entire management system that allows internal and external personnel to clearly understand how our organization's processes fit together.

## 1.6 Forms & Records

All documentation and records generated by the organization context procedure are retained and managed in accordance with the Documented Information Procedure.

Title & Description
Context & Interested Parties
Process Matrix & Application

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SWOT Analysis Template

PESTLE Analysis Template