PATHWAY GUIDE

Research

August 2026

Research

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1 Introduction

This guide supports the Research pathway. It is designed to help you understand more about qualifying in this area.

You must use this guide in conjunction with the core assessment documentation, which is available on the RICS website and comprises of:

- Requirements and competencies guide
- Candidate guide for your RICS assessment, e.g. APC, Academic, Senior Professional, Specialist
- Counsellor guide.

You can download all the supporting guidance from the **Sector pathways** web page.

All RICS pathways are global, though it is appreciated that markets may vary from country to country. If you have any queries please contact your local office.

About the competencies

The RICS competency framework ensures those applying for the RICS qualification are competent to practise and meet the highest standards of professionalism required by RICS. There is a wide range of pathways available to qualify as an RICS professional covering many different areas of practice.

The RICS assessment aims to assess that you are competent to carry out the work of a qualified chartered surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS competencies are also based upon attitudes and behaviours. The competencies are presented in a generic way so they can be applied to different areas of practice and geographical locations.

It is important that you interpret them within the context of your own area of practice or specialism and location.

Each competency is defined at three levels of attainment. You must reach the required level in a logical progression and in successive stages.

Level 1 – knowledge and understanding

Level 2 – application of knowledge

Level 3 – reasoned advice, depth and synthesis of technical knowledge and its implementation.

The competencies are in three distinct categories:

Mandatory – the personal, interpersonal, professional practice and business skills common to all pathways and mandatory for all candidates.

Technical core – the primary skills of your chosen pathway.

Technical optional – selected as additional skill requirements for your pathway from a list of competencies relevant to the area of practice.

The mandatory competency requirements are set out in detail in the *Requirements and competencies guide*.

Choosing your competencies

It is important that you give careful thought to your choice and combination of competencies. Your choice will inevitably reflect the work you do in your day-to-day environment (driven by the needs of your clients/employer). Your choice and combination of competencies will be a reflection of your judgement.

At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfil the role of a surveyor in your field of practice.

This guide should help candidates and employers with a degree of assistance in choosing the competencies that are most appropriate to their area of practice.

RICS pathways are designed to include rules about competency selection.

- For pathways with a **core** competency required to Level 1, candidates **can choose** the same competency to Level 2 or Level 3 as part of their **optional** selection where it is permitted in the pathway guide.

  For example, in the Building surveying pathway, Fire safety is **core** to Level 1. It is also **optional** and can be selected to a higher level.
- For pathways with a **core** competency required to Level 2, candidates **cannot choose** the same competency to Level 3 as part of their **optional** selection.

- Some pathways include **mandatory** competencies that can be selected to a higher level as part of the **core** or **optional** requirements.

  Where this is the case, the competencies are grouped together as 'one' (see example below). Candidates can choose **only one*** as part of their overall selection.

Optional competencies

Three to Level 3

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution **or** Data management **or** Sustainability

(* For the Building control pathway, candidates can select up to two of these competencies. This is because Client care and Data management are grouped as 'one' and Sustainability is listed separately.)

- Most pathways require candidates to choose at least one competency from the full list of technical competencies in the *Requirements and competencies guide* (see example below).

Plus, **one to Level 3** or **two to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

Where this is the case, a **mandatory** competency can only be selected:

  - if it is listed as technical (**core** or **optional**) in the pathway guide **and**
  - if grouped with other competencies as 'one' (see third bullet point above), no other competency from the group has already been selected.

Where to find help

RICS has fully trained teams across the globe who will be able to help you with any queries. For details of your local office, visit the Contact us web page.

2 About the pathway

For this pathway, you must demonstrate competence in research that is applied to the delivery of solutions on a wide range of projects; employing a range of approaches and relating to numerous locations.

You must choose one of the 'sector' pathways to base your research on (also known as the 'focus' pathway).

The core competencies are research-specific to Level 3:

- Client care
- Data management
- Research methodologies and techniques.

See the Core competencies section from page 5 for the full competency descriptors and examples of the likely knowledge, skills and experience required.

You must then select:

- Five optional competencies to Level 1 from the technical list in the sector/focus pathway.

If, for example, your area of specialism is research on aspects of spatial planning issues, your optional competencies should be selected from the Planning and development pathway.

These competencies are to Level 1 (knowledge and understanding); assessors will need to be assured you have a deep theoretical knowledge. You do not need to evidence practical experience.

Finally, you are required to demonstrate:

- One competency to Level 2 **and** two competencies to Level 1 from the full list of technical competencies in the *Requirements and competencies guide*. This selection does not have to be limited to the competencies in your sector/focus pathway.

As a candidate on the Research pathway, your assessment is based on your ability to conduct and report on research. The focus will be on your skills as a researcher. Questioning at the final assessment interview will be about actual research projects you have undertaken, for example:

- How did you establish the client brief?
- What information sources did you identify?
- How did you organise the data?
- How did you organise the project as a whole?
- What techniques and methodologies did you use for data collection, storage and analysis?
- How effectively did you consider the client's information needs, present your findings and cover aspects that will shed light on a problem so that the client gets the maximum benefit from the research?

3 Pathway requirements

Mandatory	Core	Optional	
Level 3 • Ethics, Rules of Conduct and professionalism **Level 2** • Client care • Communication and negotiation • Health and safety **Level 1** • Accounting principles and procedures • Business planning • Conflict avoidance, management and dispute resolution procedures • Data management • Diversity, inclusion and teamworking • Inclusive environments • Sustainability	**Level 3** • Client care • Data management • Research methodologies and techniques	**Five to Level 1** from the core and/or optional competency lists for your chosen pathway. Plus, **one to Level 2** and **two to Level 1** from the full list of technical competencies.	Candidates must demonstrate competence in research that is applied to the delivery of solutions on a wide range of projects; employing a range of approaches and relating to numerous locations. The research must be relevant to the chosen pathway.

Note: the requirements differ if you are enrolled onto the Academic assessment. You must demonstrate the competencies set out in the *Academic applicant guide*. See Appendix A for further information.

4 Core competencies

Client care

Description of competency in context of this sector

This competency covers how a surveyor meets a client's brief in respect of a specific appointment and how they deal with a client from a business and professional perspective.

The term 'client' as it is used in this competency means not only the contractual party who has appointed the surveyor, but also all of the stakeholders in a project with whom the surveyor has to engage.

This competency is closely linked to Ethics, Rules of Conduct and professionalism, which defines professional behaviour and sets out some mechanisms for protecting clients.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and practice of client care including: • the concept of identifying all clients/colleagues/third parties who are your clients and the behaviour that is appropriate to establish good client relationships • the systems and procedures that are appropriate for managing the process of client care, including complaints • the requirement to collect data, analyse and define the needs of clients.	Provide evidence of practical application of the principles and practice of client care in your area of practice.	Provide evidence of reasoned advice given to clients and others.
Examples of knowledge comprised within this level are: • the information contained within a client's brief • defining your scope of services within the limits of your competence and PI insurance • how fees are established • the use of standard forms of appointment • mechanisms contained within an appointment document • insurance requirements (legal and RICS) • how stakeholders are identified and how their status within the project is established	Examples of activities and knowledge comprised within this level are: • compiling an appointment document • establishing project stakeholders and their status • setting up communication systems with a client and stakeholders • issuing reports to a client, e.g. cost reports • dealing with a complaint • measurement of KPIs	Examples of activities and knowledge comprised within this level are: • developing tailored proposals linked to business strategies • presenting a prioritised and informed brief to enable decision-making • value management with stakeholders to ensure delivery against client expectations • advising on the need for statutory and other consents and approvals • presenting alternative proposals including option appraisals • presenting outline schedules of work

Level 1

- formal communication systems with clients and stakeholders
- complaints handling procedures
- key performance indicators (KPIs) the methods of data gathering during the inception stage of a project including client briefings and site-based information
- the law applicable to your area of practice, in particular those relating to employment law, statutory compliance, consents and approvals
- the principles of the preparation of alternative outline proposals, including the methodology of preparing option appraisals
- the principles of preparing outline schedules of work.

Level 2

- analysing the data gathered through the client briefing process and formulating a detailed client brief
- consulting with the statutory authorities on the consents and other approvals required
- preparing alternative outline design proposals, including option appraisals
- preparing outline schedules of work
- assessing client relationships, team performance and stakeholder interfaces on international projects.

Level 3

- agreeing the level of fees with a client
- issuing an appointment document
- ensuring insurances are in place
- setting performance levels and KPIs
- monitoring compliance with the scope of services
- monitoring performance internally and externally against client/stakeholder performance levels
- reporting to clients and stakeholders
- using KPIs to improve performance.

Data management

Description of competency in context of this sector

This competency covers how data relating to individual projects and a surveyor's work generally is collected, stored and retrieved. In addition to understanding the different storage systems and data sources available and knowing how they work, a candidate should also understand the principles behind the systems and what makes them effective. Candidates should also understand how general information and data is managed on a project and the increasing use of computerised central project databases.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the sources of information and data, and the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.	Provide evidence of practical application in your area of practice and understand the relevance of information gathered and the uses to which it can be applied. Analyse the information and data collected.	Provide evidence of reasoned advice given to clients and others on the use and practical application of the information collected and systems used, and/or specify the most appropriate way for your own and/or client organisation to collect, analyse and apply relevant information and data.
Examples of knowledge comprised within this level are: • the use of published sources of data • how data is collected, analysed and stored within your employer's organisation • how project information is stored within your employer's organisation • how electronic database systems work • the use of computerised central project databases or building information modelling, the benefits, challenges and dangers • how technical libraries are set up and used • legislation applicable to data management and data access • use and limitations of property information tools within your area of practice • difference between deeds and registered titles.	Examples of activities and knowledge comprised within this level are: • obtaining data from published sources for use on a project • obtaining data from in-house sources • extracting data for inclusion in a database • setting up and using paper-based or electronic project filing systems • using a computerised central project database • inputting and extracting data from BIM • retrieving information from a technical library • setting up a technical library • writing clear and factual reports on information extracted from a property record or information system • assisting in the development of a property information system • interpreting plan/map data • interpreting legal language in relation to property records	Examples of activities and knowledge comprised within this level are: • advising on data storage system • advising on business filing systems • benchmarking from analysed historic data • advising on the use of a computerised central project database • advising on security of data • advising colleagues on relevant data through completing returns and market survey data • complying with client's data security requirements • incorporating data research into complex reasoned advice to clients • presenting conclusions to clients from data research and analysis.

Level 1	Level 2	Level 3
	• ensuring data security • inputting survey and valuation data • extracting and using survey and valuation data • data search for comparable evidence • data search for due diligence functions.	

Research methodologies and techniques

Description of competency in context of this sector

This competency covers the ability to collect, collate and analyse appropriate data and other material to enable to provision of strategic management consultancy advice.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate your ability to collect and collate appropriate data and other relevant material. Demonstrate familiarity with data and other sources, and with data handling and manipulation techniques.	Demonstrate the effective and appropriate analysis and interpretation of data and other material. Demonstrate your ability to make effective use of appropriate research methodologies and techniques, and to match your choice of methodologies to client requirements.	Demonstrate effective application of analysis and interpretation of research. Demonstrate your ability to apply the analysis to client requirements.
Examples of knowledge comprised within this level are: • the different data handling and manipulation techniques • how to select appropriate methodologies and techniques for different consultancy services • the benefits and limitations of each technique • relevant IT support • how to deal with sensitive information • relevant legislation regarding handling and using data.	Examples of activities and knowledge comprised within this level are: • preparing data/information • analysing data using a range of different methodologies and techniques • using selected methodologies and techniques to achieve agreed outcomes • keeping appropriate records and files • drawing conclusions based on analysed information both quantitatively and qualitatively.	Examples of activities and knowledge comprised within this level are: • reporting to clients providing advice based on detailed data analysis and interpretation • evaluating the effectiveness of methodologies and techniques used.

Appendix A

Competency category	Research pathway competency requirements for APC, Senior Professional and Specialist candidates (for information/comparison purposes)	Research pathway competency requirements for Academic candidates
Mandatory	Same	Same
Core	• Client care to Level 3 • Data management to Level 3 • Research methodologies and techniques to Level 3.	• Data management to Level 2 • Research methodologies and techniques OR Leadership to Level 3 • One core competency to Level 3 from the chosen pathway* *Note: When on the Research pathway, this means: If candidates have selected **Research methodologies and techniques** instead of **Leadership**, the final core competency must be **Client care to Level 3**, as it is the only remaining core competency in the Research pathway. If candidates have selected **Leadership**, this competency can be **Client care** or **Research methodologies and techniques to Level 3**. Note: the *Requirements and competencies guide* includes the descriptor for the **Leadership** competency.
Optional	Five to Level 1 from the technical list in the sector/focus pathway.	Five to Level 2 from the technical list in the chosen pathway* *If Research is the chosen pathway, the five competencies to Level 2 will be from the sector/focus pathway.
Optional plus	One to Level 2 **and** Two to Level 1 from full list of technical competencies.	N/A

Delivering confidence

We are RICS. As a member-led chartered professional body working in the public interest, we uphold the highest technical and ethical standards.

We inspire professionalism, advance knowledge and support our members across global markets to make an effective contribution for the benefit of society. We independently regulate our members in the management of land, real estate, construction and infrastructure. Our work with others supports their professional practice and pioneers a natural and built environment that is sustainable, resilient and inclusive for all.

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