PILOT PATHWAY GUIDE

Sustainability advisory

November 2025

Sustainability advisory

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1 Introduction

This guide supports the **Sustainability advisory** 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 on 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 technical optional competencies are organised into four sector-based groupings called areas of emphasis:

- Land and natural resources: focuses on sustainable management and planning of land, natural systems and resource use to support climate resilience, biodiversity and long-term environmental, social and economic value.
- Construction and infrastructure: emphasises sustainable delivery, commissioning and procurement practices across the built environment in order to reduce carbon emissions, enhance performance and drive innovation.
- Property: addresses sustainability in building operation, leasing, valuation and strategic asset management, enabling professionals to improve ESG outcomes and long-term asset value.
- Investment and finance: supports integration of climate risk, ESG due diligence and sustainability insights into investment strategy, portfolio management and financial decision-making.

Candidates must select an area of emphasis that reflects their area of professional impact, and select two competencies at level 2 from the chosen area of emphasis.

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.

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

The planning, design, delivery and management of the built and natural environment must address the worldwide challenge of cutting carbon emissions, while also promoting social equity, economic resilience and access to viable, affordable and high-quality spaces and assets. This dedicated pathway provides a way to join RICS for sustainability professionals who specialise in the built and natural environment.

The **Sustainability advisory** pathway underpins the growing demand for professional leadership in this field, extending the core surveying skills of measurement, management and strategic assessment to delivering environmental, social and governance (ESG) solutions for a more sustainable world.

RICS qualification

This pathway is designed for professionals providing strategic sustainability advice across the built and natural environment. They may be working in a professional consultancy or in a government, owner, investor, occupier, developer or construction entity. Their work is likely to focus on devising and leading strategy in areas such as climate action, nature, circularity and social value, with emphasis on governance, risk, finance and systems thinking. The pathway is suited to those in advisory, leadership or coordination roles guiding sustainability outcomes at project, portfolio or policy levels.

Chartered alternative designations

All candidates qualifying through this pathway will be entitled to use the designation 'chartered surveyor'.

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** • Principles of sustainability and climate literacy • Sustainability governance, disclosure and reporting • Social value, health, place and community • Sustainable design, resource use and asset performance	**Area of emphasis: land and natural resources** • Land use planning for climate and nature • Natural capital: biodiversity and carbon removals • Renewable energy infrastructure • Environmental and social impact assessment **Area of emphasis: construction and infrastructure** • Whole life carbon and circularity • Sustainable procurement and supply chains • Sustainable asset delivery • Renewable energy infrastructure • Retrofit strategy and delivery **Area of emphasis: property** • Green leasing and occupation • Sustainability performance reporting • ESG and sustainability due diligence • Retrofit strategy and delivery **Area of emphasis: investment and finance** • Sustainability and ESG in valuation • ESG and sustainability due diligence • Climate scenario analysis and transition risk • Sustainable finance instruments and taxonomies

4 Technical competencies guidance

Technical core competencies

Principles of sustainability and climate literacy

This competency covers the scientific basis for understanding the interactions between natural processes and human activities that lead to environmental pressure, and linking general principles to their applications in the built and natural environment.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge of key sustainability principles and climate science, including global and local environmental challenges. Understand how these relate to the built and natural environment, professional responsibilities and long-term outcomes for people, places and ecosystems.	Apply sustainability and climate principles to real-world situations in your field of practice. Support sustainable decision-making and demonstrate awareness of trade-offs between environmental, social and economic outcomes.	Lead or influence sustainability and climate action at a sector, organisational, portfolio or project level. Drive culture, strategies or initiatives that improve sustainability performance and contribute to resilience.
Examples of knowledge at this level are: • Systems thinking and the interconnections between environment, society and economy • Fundamentals of climate science, carbon budgets, tipping points and planetary boundaries • Key policy frameworks and goals (e.g. UN SDGs, Paris Agreement, net zero and climate justice, UN Convention on Biological Diversity) • RICS ethical obligations and professional standards related to sustainability	Examples of activities and knowledge at this level are: • Embedding sustainability into project briefs, procurement or planning advice • Supporting delivery of net zero or biodiversity outcomes • Advising clients or internal teams on climate risks and opportunities • Reflecting equity and justice in project development or stakeholder engagement	Examples of activities and knowledge at this level are: • Providing reasoned advice to stakeholders or boards on sustainability and climate risks, opportunities and strategic responses • Guiding the development of organisational or client roadmaps for decarbonisation, adaptation or resilience • Leading cross-disciplinary teams to embed sustainability and climate literacy across projects, programmes or portfolios • Promoting or influencing professional practice, standards or policies within own organisation, sector or client network

Sustainability governance, disclosure and reporting

This competency covers an understanding of governance structures, sustainability standards and reporting frameworks relevant to ESG, risk and compliance in the built and natural environment.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate an understanding of governance structures, sustainability standards and reporting frameworks relevant to ESG, risk and compliance in the built and natural environment.	Support implementation of sustainability governance, reporting or audit processes. Apply frameworks to inform project or asset decisions and ensure accurate, decision-useful information.	Lead or oversee sustainability governance and disclosure strategies across portfolios organisations or advisory functions. Provide reasoned advice on regulatory alignment, risk management and strategic integration.
Examples of knowledge at this level are: • International Sustainability Standards Board (ISSB) and International Financial Reporting Standards Sustainability Disclosure Standards (IFRS SDS S1 and S2), principles and purpose of the Taskforce on Climate-related Financial Disclosures (TCFD), Sustainable Finance Disclosure Regulation (SFDR), Taskforce on Nature-related Financial Disclosures (TNFD), Global Reporting Initiative (GRI), Corporate Sustainability Reporting Directive (CSRD), Science-Based Targets Initiative (SBTi), S&P Global Corporate Sustainability Assessment (CSA), Carbon Disclosure Project (CDP) and other disclosure frameworks • Materiality assessments and double materiality • Risk classification (physical, transition, systemic) • Importance of transparency, comparability and data integrity in reporting	Examples of activities and knowledge at this level are: • Contributing to TCFD-aligned climate risk reporting • Supporting data collection for ESG metrics or certification • Advising on disclosure requirements for clients or projects • Applying taxonomies or classifications to support decision-making	Examples of activities and knowledge at this level are: • Providing reasoned advice to clients, boards or leadership team on sustainability governance and disclosure frameworks • Guiding the design and implementation of sustainability or ESG reporting systems across projects, programmes or portfolios • Overseeing the assurance of sustainability data, disclosures and performance metrics • Influencing organisational policies or industry practices to improve transparency, accountability and alignment with global standards

Social value, health, place and community

This competency covers an understanding of the built and natural environment's contribution to health, wellbeing, inclusion and equity. It also includes understanding key principles of social value.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate an understanding of how the built and natural environment contributes to health, wellbeing, inclusion and equity. Understand key frameworks, terminology and drivers of social value.	Apply principles of inclusive, health-promoting and socially valuable development. Support projects that improve equity, accessibility and community benefit.	Provide reasoned advice on the integration of social value, health and community well-being considerations into projects, programmes or organisational strategies. Embed social sustainability into strategic decision-making or project delivery.
Examples of knowledge at this level are: • Definitions of social value, equity, accessibility and inclusive design • Basics of population health, placemaking and wellbeing metrics • The role of stakeholders and communities in shaping outcomes • Relevant policies and global certifications (e.g. UN Sustainable Development Goals (SDGs), WHO Health in All Policies, UN Guiding Principles on Business and Human Rights (UNGPs), ISO 2600 (social responsibility), LEED Social Equity Pilot Credits, Public Services (Social Value) Act 2012, Environment Act 2021, WELL Building Standard)	Examples of activities and knowledge at this level are: • Supporting social value delivery plans, and community engagement or impact assessments • Applying inclusive design principles, or well-being frameworks, building certifications and assessments, such as WELL, Fitwel, Living Building Challenge, RESET, Passivhaus HHS and HHC • Advising on accessibility, active travel or health-in-all-policies approaches	Examples of activities and knowledge at this level are: • Advising clients, leadership teams or community stakeholders on social value, equity and well-being outcomes • Promoting the development of strategies that integrate health- and place-based value into design or delivery decisions • Guiding impact measurement, reporting and assurance of social and community outcomes for projects, portfolios or organisations

Sustainable design, resource use and asset performance

This competency focuses on integrating sustainability principles into the design, resource use and performance of built assets across their life cycle, enabling professionals to reduce environmental impact, enhance efficiency and drive long-term value.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate an understanding of how design choices, resource use and operational performance influence environmental impact and resource efficiency across the asset life cycle.	Apply sustainability principles to influence planning, design, resource use, procurement, construction or management. Use data and tools to optimise outcomes related to carbon, water, resource efficiency and performance.	Lead or advise on the integration of sustainable design, resource efficiency and performance outcomes across projects, programmes or organisations. Influence long-term decisions to improve value and resilience, and reduce environmental impact.
Examples of knowledge at this level are: • Definitions of whole life carbon, embodied carbon and operational energy • Circular economy principles, waste hierarchy, reuse and deconstruction • Basics of building performance, passive design or nature-based solutions • Key standards and tools (e.g. EN 15978, ISO 21931, ISO 37101, ISO 59004, PAS 2080, BS 8001, CIBSE TM65, BREEAM, LETI NABERS, LEED, WELL, Green Star, EDGE, DGNB and SITES)	Examples of activities and knowledge at this level are: • Undertaking whole life carbon assessments (WLCAs), resource efficiency audits or post-occupancy evaluations • Supporting decisions on resource selection, modern methods of construction, materials reuse or low-impact procurement • Applying benchmarks or certification schemes to support environmental outcomes	Examples of activities and knowledge at this level are: • Advising clients or leadership teams on strategies for circular economy, biodiversity, low-carbon design or efficient resource use • Leading project- or portfolio-level initiatives that embed sustainability across planning, delivery or management • Guiding performance measurement and benchmarking (e.g. energy, carbon or resource intensity) to drive continuous improvement

Technical optional area of emphasis: Land and natural resources

Land use planning for climate and nature

This competency focuses on integrating climate resilience and nature-based solutions into land use and spatial planning, to help shape sustainable environments through strategic decision-making, ecological insight and stakeholder collaboration.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate an understanding of the principles and approaches of integrating climate resilience and nature-based solutions into land use planning.	Apply knowledge to support the development of land use strategies or spatial plans that incorporate nature and climate resilience.	Lead and manage strategic land use or spatial planning projects with climate and ecological integration. Provide professional advice and coordinate input from stakeholders.
Examples of knowledge at this level are: • Climate-resilient spatial planning principles • Land zoning and climate adaptation approaches • Green and blue infrastructure integration • Ecosystem service mapping and planning • Regulatory frameworks, including the Land use, land-use change and forestry Regulation (LULUCF) - LULUCF Regulation (EU) 2018/841, EU Carbon Removals and Carbon Farming (CRCF) Regulation (EU/2024/3012) , EU Soil Strategy for 2030, UK National Planning Policy Framework (NPPF 2024) and Biodiversity Net Gain (BNG) under Schedule 7A of the Town and Country Planning Act 1990 (as inserted by Schedule 14 of the Environment Act 2021)	Examples of activities and knowledge at this level are: • Undertaking site appraisals, considering environmental and ecological constraints • Contributing to spatial planning, master planning or local nature recovery strategies • Identifying opportunities for nature-based solutions • Applying relevant tools or data layers to inform spatial priorities	Examples of activities and knowledge at this level are: • Developing climate- and nature-positive spatial strategies • Facilitating multi-stakeholder land use planning processes • Delivering policy advice or contributing to regional/national frameworks

Natural capital: biodiversity and carbon removals

This competency focuses on understanding biodiversity, natural capital and the role of nature in carbon sequestration and ecosystem resilience.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand the concepts of biodiversity, natural capital and the role of nature in carbon sequestration and ecosystem resilience.	Apply understanding to support assessments or interventions that enhance biodiversity and/or carbon removal benefits.	Lead or oversee biodiversity or nature-based carbon strategies. Advise on policy, funding or valuation of ecosystem benefits.
Examples of knowledge at this level are: • Definitions of natural capital, ecosystem services and biodiversity • Carbon sequestration from land types (e.g. peatland, woodland and grassland) • International and national legislation and frameworks (e.g. UN Convention on Biological Diversity, EU Habitats Directive, ISO 14054 – Natural capital accounting for organizations – Principles, requirements and guidance, ISO/TC 331 – Biodiversity (under development), ISO/TC 207/SC 7 – Greenhouse gas and climate change management and related activities (also under development), biodiversity net gain and The Conservation of Habitats and Species Regulations 2017) • Role of nature in flood, heat and pollution mitigation	Examples of activities and knowledge at this level are: • Participating in baseline surveys or biodiversity assessments • Supporting delivery of woodland creation or rewilding schemes • Advising on carbon codes (e.g. Verified Carbon Standard (VCS), Gold Standard, Peatland Code and Woodland Carbon Code) • Interpreting natural capital accounting reports	Examples of activities and knowledge at this level are: • Designing or reviewing net gain strategies or natural capital plans • Developing carbon removal portfolios or investment propositions • Engaging with stakeholders on nature market mechanisms

Renewable energy infrastructure

This competency focuses on understanding different types of renewable energy and their land, environmental and planning considerations.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand different types of renewable energy and their land, environmental and planning considerations.	Apply understanding to support renewable energy feasibility or development activities.	Lead or advise on renewable infrastructure developments from a land, planning or environmental perspective.
Examples of knowledge at this level are: • Solar, wind, hydro, geothermal and biomass technologies • Land use implications of grid-scale versus distributed systems • Planning and permitting for renewables • Environmental sensitivities and mitigation needs	Examples of activities and knowledge at this level are: • Site screening for renewable suitability • Contributing to EIAs or planning submissions • Understanding energy yield, land take and biodiversity impact trade-offs	Examples of activities and knowledge at this level are: • Supporting clients in land acquisition or consenting for renewables • Engaging with communities or regulators • Advising on co-location with agriculture or biodiversity enhancement

Environmental and social impact assessment

This competency covers the principles, processes and practices involved in identifying, assessing and managing the environmental and social impacts of land and natural resource-related activities. It includes understanding regulatory frameworks, stakeholder engagement and the integration of environmental and social considerations into planning and decision-making.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge of the purpose, principles and processes of environmental and social impact assessment, including relevant legal, regulatory and policy frameworks.	Apply assessment principles and methodologies to support the assessment and management of environmental and social impacts in land and natural resource projects.	Lead or advise on the strategic integration of environmental and social impact assessments into land and natural resource planning, development and management.
Examples of knowledge at this level are: • Key components and stages of an assessment (screening, scoping, baseline studies, impact prediction, mitigation and monitoring) • Environmental and social risks associated with land use, development and resource extraction • Relevant legislation, standards and international frameworks • The role of stakeholder engagement and public participation in impact assessment	Examples of activities and knowledge at this level are: • Supporting the development or review of environmental and social impact assessments • Identifying potential environmental and social risks, and proposing mitigation measures • Engaging with stakeholders to inform impact assessments and address concerns • Advising on compliance with environmental and social regulations and standards	Examples of activities and knowledge at this level are: • Leading the design and delivery of complex environmental and social impact assessments for major land or resource projects • Advising clients, regulators or boards on environmental and social risks, opportunities and compliance strategies • Developing or overseeing environmental and social management plans, and monitoring frameworks • Contributing to the evolution of policy, standards or professional practice in the sector

Technical optional area of emphasis: Construction and infrastructure

Whole life carbon and circularity

This competency focuses on understanding carbon emissions from all types of projects and assets over their life cycles.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand the concepts of whole life carbon, embodied versus operational emissions and circular economy principles as applied to construction and infrastructure.	Apply knowledge to assess, track or reduce whole-life carbon, or support circularity, in buildings and infrastructure delivery.	Lead strategies for buildings and infrastructure that are low-carbon and circular. Coordinate assessments and engage supply chains.
Examples of knowledge at this level are: • PAS 2080, EN 15978 and the RICS WLCA standard • Circular economy concepts: design for reuse, material passports • Key carbon hotspots in infrastructure design and construction	Examples of activities and knowledge at this level are: • Contributing to WLCA or material efficiency assessments • Supporting specification of low-carbon and circular materials • Advising on reuse, deconstruction or end-of-life scenarios	Examples of activities and knowledge at this level are: • Driving embodied carbon reductions at programme or portfolio level • Embedding circular design into contracts, building information models or procurement • Using appropriate carbon measurement tools, databases and benchmarks

Sustainable procurement and supply chains

This competency focuses on embedding sustainability and ethical standards into procurement and supply chain practices, enabling professionals to drive responsible sourcing, ESG performance and low-carbon innovation across infrastructure and construction.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand principles of sustainable and ethical procurement in infrastructure and construction.	Apply sustainable procurement approaches within supply chain or tender processes.	Lead sustainable procurement strategies and manage supplier performance on ESG.
Examples of knowledge at this level are: • Modern slavery, human rights and responsible sourcing • Sustainability requirements in procurement (e.g. PPN 06/21) • Chain of custody standards (e.g. FSC, BES 6001)	Examples of activities and knowledge at this level are: • Supporting supplier engagement or due diligence • Embedding sustainability KPIs into contracts • Using procurement frameworks to secure ethical outcomes	Examples of activities and knowledge at this level are: • Establishing net zero or social value requirements for suppliers • Overseeing verification/auditing of ethical practices • Leading collaboration on innovation in low-carbon materials

Sustainable asset delivery

This competency focuses on delivering assets that achieve long-term sustainability performance and value by integrating life cycle thinking, climate resilience and adaptive design from concept to handover.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand sustainability performance and life cycle cost/ value across asset delivery.	Apply sustainability insights to guide asset design and delivery decision-making.	Lead or manage sustainable asset strategies, coordinating design, costing and value appraisals.
Examples of knowledge at this level are: • Asset life cycle costs and value drivers (e.g. capital, operational, environmental and social factors) • Key performance metrics for resilience, functionality and adaptability • Interaction between sustainability and asset life cycle planning	Examples of activities and knowledge at this level are: • Supporting life cycle assessment, climate adaptation or resilience integration • Inputting into design reviews or cost-benefit analysis • Applying adaptive design or modularity in practice • Applying whole life cost/value concepts (capex/opex/ carbon/social) to support decision-making in asset delivery	Examples of activities and knowledge at this level are: • Driving sustainable performance from concept through to handover • Leading post-occupancy or benefits realisation assessments • Managing trade-offs and delivering long-term value

Renewable energy infrastructure

This competency focuses on understanding different types of renewable energy and their land, environmental and planning considerations.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand several types of renewable energy and their land, environmental and planning considerations.	Apply understanding to support renewable energy feasibility or development activities.	Lead or advise on renewable infrastructure developments from a land, planning or environmental perspective.
Examples of knowledge at this level are: • Solar, wind, hydro, geothermal and biomass technologies • Land use implications of grid-scale versus distributed systems • Planning and permitting for renewables • Environmental sensitivities and mitigation needs	Examples of activities and knowledge at this level are: • Site screening for renewable suitability • Contribution to EIAs or planning submissions • Understanding energy yield, land take and biodiversity impact trade-offs	Examples of activities and knowledge at this level are: • Supporting clients in land acquisition or consenting for renewables • Engaging with communities or regulators • Advising on co-location with agriculture or biodiversity enhancement

Retrofit strategy and delivery

This competency focuses on planning and delivering building retrofit strategies that reduce emissions, enhance performance and manage risks, enabling professionals to support net zero goals through informed design, regulation and stakeholder coordination.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand drivers, methods and regulatory frameworks for retrofitting buildings to reduce emissions and improve performance.	Support retrofit feasibility studies, audits or delivery projects.	Lead development or delivery of retrofit strategies at asset or portfolio scale.
Examples of knowledge at this level are: • RICS' Residential retrofit standard, RE2020, EnerPHit standard, PAS 2035, EPC standards and MEES requirements • Common retrofit measures (e.g. insulation, glazing and heating) • Risk areas such as thermal bridging, damp and ventilation	Examples of activities and knowledge at this level are: • Assisting with retrofit assessments and improvement plans • Understanding heritage constraints and risk mitigation strategies • Supporting coordination of installers, designers and finance	Examples of activities and knowledge at this level are: • Designing retrofit pathways to net zero carbon • Managing investment cases and stakeholder engagement • Integrating monitoring and performance assurance

Technical optional area of emphasis: Property

Green leasing and occupation

This competency focuses on fostering collaboration between landlords and occupiers to achieve sustainable building operation, through green leasing practices, shared ESG goals and performance-driven engagement.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand the interface between landlords and occupiers in achieving sustainable building operation.	Support implementation of sustainability in leasing and occupier engagement.	Lead integration of sustainability into asset and lease management strategy.
Examples of knowledge at this level are: • Concepts of green leases and shared ESG goals • Operational energy, waste, water, transport and health indicators • Importance of tenant engagement and collaboration	Examples of activities and knowledge at this level are: • Drafting or reviewing green lease clauses • Setting up tenant engagement programmes • Tracking and reporting shared performance goals	Examples of activities and knowledge at this level are: • Delivering owner-occupier ESG frameworks • Leading net zero operational strategies • Influencing occupier behaviour and reporting frameworks

Sustainability performance reporting

This competency focuses on developing and maintaining ESG and sustainability reporting and compliance.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand ESG reporting principles, frameworks and asset-level performance metrics.	Support ESG reporting processes, data analysis and assurance.	Lead strategy, governance and assurance for sustainability reporting.
Examples of knowledge at this level are: • SBTi, CDP, CSRD, UK CFD, IFRS SDS S1 and S2, GRESB, TCFD, CRREM, NABERS and SFDR disclosures • Key sustainability indicators (e.g. carbon intensity and waste diversion) • Tools for monitoring performance data	Examples of activities and knowledge at this level are: • Collating and reviewing data submissions for sustainability/ ESG reporting • Interpreting performance against industry or sustainability benchmarks • Supporting internal/external sustainability or ESG reports, investor responses or regulatory disclosures	Examples of activities and knowledge at this level are: • Designing portfolio-wide sustainability or ESG reporting systems • Ensuring compliance with sustainability and/or ESG regulatory and investor compliance • Engaging with ratings agencies, regulators, auditors and sustainability verification bodies

ESG and sustainability due diligence

This competency focuses on identifying and managing ESG risks and opportunities in property and infrastructure transactions, enabling professionals to support regulatory compliance, investment decisions and sustainable outcomes through robust due diligence processes.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand the purpose and scope of ESG due diligence in property and infrastructure transactions.	Support due diligence exercises that screen for ESG risks and opportunities, and assess potential impacts on value preservation or investment outcomes.	Lead ESG due diligence and investor engagement processes, ensuring sustainability considerations are integrated into value, acquisition, and divestment strategies.
Examples of knowledge at this level are: • ESG red flag checklists • Compliance with sustainability regulations • Common risks (e.g. legacy pollution and carbon liabilities)	Examples of activities and knowledge at this level are: • Contributing to data room reviews or ESG risk matrices • Assessing alignment with corporate ESG goals or standards • Advising on mitigation or enhancement opportunities	Examples of activities and knowledge at this level are: • Overseeing technical or legal ESG due diligence • Supporting investment decisions with sustainability insights • Integrating ESG into acquisition or divestment strategy

Retrofit strategy and delivery

This competency focuses on planning and delivering building retrofit strategies that reduce emissions, enhance performance and manage risks, enabling professionals to support net zero goals through informed design, regulation and stakeholder coordination.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand drivers, methods and regulatory frameworks for retrofitting buildings to reduce emissions and improve performance.	Support retrofit feasibility studies, audits or delivery projects.	Lead development or delivery of retrofit strategies at asset or portfolio scale.
Examples of knowledge at this level are: • PAS 2035, EPC standards and MEES requirements • Common retrofit measures (e.g. insulation, glazing and heating) • Risk areas such as thermal bridging, damp and ventilation	Examples of activities and knowledge at this level are: • Assisting with retrofit assessments and improvement plans • Understanding heritage constraints and risk mitigation strategies • Supporting coordination of installers, designers and finance	Examples of activities and knowledge at this level are: • Designing retrofit pathways to net zero carbon • Managing investment cases and stakeholder engagement • Integrating monitoring and performance assurance

Technical optional area of emphasis: Investment and finance

Sustainability and ESG in valuation

This competency focuses on integrating ESG factors into assessments of value, risk and investment potential. It enables professionals to understand how these factors influence decision-making, long-term asset performance and value preservation. It also helps professionals to respond to market shifts, meet regulatory expectations and achieve sustainability goals.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand how ESG factors influence value, risk and long-term investment potential.	Apply sustainability and ESG insights to assess asset performance, investment risk and value preservation.	Lead integration of sustainability and ESG considerations into investment strategy, decision-making and value preservation practices.
Examples of knowledge at this level are: • ESG and sustainability drivers of asset risk, obsolescence and value shifts • How sustainability performance can affect supply and demand, operating costs and investment attractiveness • Professional and market guidance on integrating ESG and sustainability into value and investment considerations	Examples of activities and knowledge at this level are: • Supporting financial and investment analysis by incorporating ESG and sustainability factors • Assessing sensitivity of asset performance to sustainability variables (e.g. energy efficiency, carbon profile or regulatory changes) • Reviewing market evidence of sustainability-linked value drivers (e.g. certifications, green building performance, or investor demand)	Examples of activities and knowledge at this level are: • Developing or guiding approaches that embed sustainability and ESG into asset and portfolio value assessments • Driving consistency in how sustainability and ESG are considered across investment, asset management and finance teams • Advising clients, boards or investors on sustainability-related risk, opportunities and long-term value preservation in portfolios

ESG and sustainability due diligence

This competency focuses on identifying and managing ESG risks and opportunities in property and infrastructure transactions, enabling professionals to support regulatory compliance, investment decisions and sustainable outcomes through robust due diligence processes.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand the purpose and scope of ESG due diligence in property and infrastructure transactions.	Support due diligence exercises that screen for ESG risks and opportunities and assess potential impacts on value preservation or investment outcomes.	Lead ESG due diligence and investor engagement processes, ensuring sustainability considerations are integrated into value, acquisition, and divestment strategies.
Examples of knowledge at this level are: • ESG red flag checklists • Compliance with sustainability regulations • Common risks (e.g. legacy pollution and carbon liabilities)	Examples of activities and knowledge at this level are: • Contributing to data room reviews or ESG risk matrices • Assessing alignment with corporate ESG goals or standards • Advising on mitigation or enhancement opportunities	Examples of activities and knowledge at this level are: • Overseeing technical or legal ESG due diligence • Supporting investment decisions with sustainability insights • Integrating ESG into acquisition or divestment strategy

Climate scenario analysis and transition risk

This competency focuses on assessing climate-related risks and opportunities through scenario analysis, enabling professionals to support strategic decision-making, regulatory alignment and resilience across assets and investments.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Understand climate scenarios, physical/transition risk and disclosure expectations.	Support scenario analysis, risk assessment or strategy alignment.	Lead integration of climate risk analysis into investment, asset or portfolio strategy.
Examples of knowledge at this level are: • IPCC scenarios, RCPs, SSPs, TFND and TCFD requirements • Key international disclosure frameworks (e.g. ISSB, TCFD, SFDR and regional equivalents).Concepts of adaptation and net zero transition risk	Examples of activities and knowledge at this level are: • Interpreting climate models or risk tools (e.g. XDI, CRREM) • Supporting regulatory stress testing • Advising on adaptation pathways or risk management plans	Examples of activities and knowledge at this level are: • Overseeing scenario analysis and TCFD disclosure • Managing strategic responses to transition risk • Aligning investments with science-based targets and adaptation strategies

Sustainable finance instruments and taxonomies

This competency covers the understanding and application of sustainable finance instruments and taxonomies that guide investment decisions aligned with environmental and social sustainability goals. It includes knowledge of financial mechanisms, classification systems and regulatory frameworks that support the transition to a sustainable economy in the context of the built and natural environment.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge of sustainable finance principles, instruments and taxonomies. Understand how these tools support the integration of sustainability into investment and financial decision-making in relation to the built and natural environment.	Apply knowledge of sustainable finance instruments and taxonomies to support investment analysis, project financing, or advisory services. Demonstrate understanding of how these tools influence capital allocation and sustainability performance.	Lead or advise on the strategic use of sustainable finance instruments and taxonomies to drive sustainable investment and financial decision-making. Influence policy, guide capital flows, and support the development of sustainable finance strategies.
Examples of knowledge at this level are: • Types and purposes of sustainable finance instruments (e.g. green bonds, sustainability-linked loans, transition finance) • Key sustainable finance taxonomies (e.g. EU Taxonomy, Brazilian Sustainable Taxonomy, Costa Rican Sustainable Finance Taxonomy, Panama Sustainable Finance, Taxonomy, UK Green Taxonomy, ASEAN Taxonomy) • Role of taxonomies in defining environmentally and socially sustainable economic activities	Examples of activities and knowledge at this level are: • Supporting the structuring or assessment of green or sustainability-linked financial products • Applying taxonomy criteria to assess the environmental and social performance of investments or projects • Advising clients on compliance with sustainable finance disclosure and reporting requirements	Examples of activities and knowledge at this level are: • Leading the development or evaluation of sustainable finance strategies for organizations or investment portfolios • Advising on alignment with evolving taxonomies and regulatory frameworks to ensure credibility and transparency • Engaging with financial institutions, regulators, and stakeholders to promote sustainable finance practices • Shaping market standards or contributing to the development of sustainable finance policies and classification systems

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