

# Leading the way:

Industry trends, commitments  
and best practice examples

# Foreword



UKGBC's Gold Leaf members aspire to business leadership on sustainability. They frequently ask us to challenge them, act as a critical friend, and hold them to account where their own practices fall short of other leaders in the sector. To do this, we need to be sure that we understand how some of the leading sustainability commitments of the corporate community at large translate into the built environment sector. For the past three years, we have conducted a 360 Sustainability Review of each of our Gold Leaf members to establish what their commitments are to the five key impact areas underpinning our shared vision: climate change mitigation and adaptation; resource efficiency and circular economy; nature and biodiversity; health and wellbeing; and wider socio-economic impacts. This report summarises the key findings of this research for 2018. The most notable areas of progress by Gold Leaf members include the commitment to set science-based emissions reduction targets; the commitment to biodiversity net gain; and much stronger alignment to the UNSDGs with a particular focus on social value. There is of course plenty of room for further improvement, but we're delighted to continue to be part of the journey of these members as they ramp up their efforts on such critical trends.

A handwritten signature in black ink that reads "Julie Hirigoyen". The signature is fluid and cursive.

**Julie Hirigoyen**  
Chief Executive, UKGBC

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# Executive summary

This report highlights the findings of our Gold Leaf member Sustainability 360 Review, conducted over the summer of 2018. Across UKGBC's five key areas we reviewed and analysed the commitments of our Gold Leaf members and collected best practice examples. This report identifies the future trends and business case for taking action and why change is needed. The report provides suggestions for how all companies within the built environment can transition towards more sustainable business practice and how UKGBC is working with its members to make this possible.

Based on the current industry operating model, there are a number of current and future trends as well as business case evidence which should provide motivation for businesses to review their purpose and mission. It is reassuring to observe an increasing number of Gold Leaf members setting progressive targets in relation to UKGBC's key impact areas. Despite improvements and progress being made there is still a considerable way to go in delivering truly sustainable developments. Based on our research findings and knowledge of current industry initiatives, we would like to see our Gold Leaf members take actions as identified in the table below.



## Climate change

Business case for taking action	Progress since 2017	Areas for further improvement	Call to action
<ul style="list-style-type: none"> <li>UK summer temperatures could regularly reach 38°C by the 2040s<sup>1</sup>. If no action is taken to adapt to these conditions, there could be 7,000 heat-related deaths every year in the UK by 2050<sup>2</sup></li> <li>Companies who are actively managing their carbon emissions and planning for climate change enjoy 18% higher return on investment than companies that aren't, and 67% higher than companies that refuse to disclose their emissions<sup>3</sup></li> </ul>	<ul style="list-style-type: none"> <li>In 2018, 20% of Gold Leaf members had a commitment to sign up to science-based targets, up from 15% in 2017 and 14% had already adopted such a target, up from 6% in 2017</li> </ul>	<ul style="list-style-type: none"> <li>10% have no public commitment to a carbon reduction target</li> <li>12% have no commitment to address climate change impacts on the business</li> </ul>	<ul style="list-style-type: none"> <li>Set a commitment to adopt science-based targets</li> <li>Sign up to the World Green Building Council's Advancing Net Zero commitment</li> <li>Publicly disclose the commercial risks and opportunities of climate change to the business</li> </ul>
<b>Best practice examples</b>			
<p><b>Willmott Dixon:</b> Through their Carbon Management Plan they have cut energy use, saving nearly £3m in 2014. By continuing to implement this strategy they estimate a further saving of £3m a year by 2020. Where they have found difficulties making savings, they have offset all remaining emissions.</p>		<p><b>AECOM:</b> Provide climate adaption services to both their clients and the Rockefeller Foundation's 100 Resilient Cities. In partnership with IBM they have created a Disaster Resilience Scorecard and Disaster resilience Survey.</p>	



## Resource use

Business case for taking action	Progress since 2017	Areas for further improvement	Call to action
<ul style="list-style-type: none"> <li>The price of materials used in construction increased 4.9% from May 2017 to May 2018, continuing a persistent upwards trend<sup>4</sup>. The departure of the UK from the European Union is expected to further increase the cost of importing materials</li> <li>The market for a circular economy is growing and it is estimated that over the next 10 years, this will boost economic growth by up to 4%<sup>5</sup></li> </ul>	<ul style="list-style-type: none"> <li>In 2018, 12% were targeting zero waste and 40% had a strategic commitment relating to the circular economy, in 2017 these numbers were just 10% and 6% respectively</li> </ul>	<ul style="list-style-type: none"> <li>8% have no public commitment to a waste reduction target</li> </ul>	<ul style="list-style-type: none"> <li>Aim for zero waste and set bold ambitions around creating a Circular Economy</li> <li>Implement the UKGBC Circular Economy programme output (due April 2019)</li> </ul>
<b>Best practice examples</b>			
<p><b>Arup:</b> Have partnered with the Ellen MacArthur Foundation to increase knowledge sharing in the built environment around resource use through the Ellen MacArthur Foundation network, Circular Economy 100. They have also partnered with Google and others on the Circularity Lab to develop full-scale demonstration buildings for circular design.</p>		<p><b>Marks &amp; Spencer:</b> Aim that by 2022 all their packaging will be "widely recyclable". To do this they plan to use just one polymer in packaging, to date they have transitioned from 11 in 2007 to just 4.</p>	



## Nature and biodiversity

Business case for taking action	Progress since 2017	Areas for further improvement	Call to action
<ul style="list-style-type: none"> <li>It is projected that by 2030 global urban land cover will further increase by 430,000 km<sup>2</sup> to 12,568,000 km<sup>2</sup>.<sup>6</sup> This expansion is the primary cause of species extinction and habitat loss</li> <li>Increased natural space can increase property and land values by as much as 25%<sup>7,8</sup></li> </ul>	<ul style="list-style-type: none"> <li>In 2018, 22% had committed to biodiversity net gain, up from just 9% in 2017</li> </ul>	<ul style="list-style-type: none"> <li>40% have no commitment to nature and biodiversity</li> </ul>	<ul style="list-style-type: none"> <li>Adopt biodiversity net gain targets for development and infrastructure projects</li> </ul>
<b>Best practice examples</b>			
<p><b>Aggregate Industries:</b> Use biodiversity management plans on all active extraction sites, to protect, restore and enhance the habitats and species on and around their sites. They have ten extraction sites certified by The Wildlife Trust's Biodiversity Benchmark. Their impact on nature and biodiversity is monitored using a Biodiversity Indicator Reporting System (BIRS).</p>		<p><b>Landsec:</b> Aim for a 25% biodiversity net gain across their five sites which offer the greatest potential by 2030. To achieve this, in partnership with The Wildlife Trust they have developed a methodology to measure biodiversity on all sites along with net gain plans for several sites.</p>	



## Health and wellbeing

Business case for taking action	Progress since 2017	Areas for further improvement	Call to action
<ul style="list-style-type: none"> <li>By 2030, there will be approximately two million more adults in the UK with a mental health problem<sup>9</sup>. It is estimated that the direct cost of employee absence (due to work days lost) to the economy in the UK amounted to over £14 billion in 2012<sup>10</sup></li> <li>Companies that take proactive steps to manage and promote employee wellness and engagement can improve their financial performance by as much as 10%<sup>11</sup>. Health check programmes at work have been found to reduce absenteeism and physically active workers take 27% fewer sick days<sup>12</sup></li> </ul>	<ul style="list-style-type: none"> <li>In 2018, 38% had a public commitment to measure and report health and wellbeing for their own work place. In 2017, 31% had defined health and wellbeing indicators and were tracking their impact</li> </ul>	<ul style="list-style-type: none"> <li>36% are not planning a public commitment to measure and report health and wellbeing</li> </ul>	<ul style="list-style-type: none"> <li>Set a public commitment to measure and report health and wellbeing for the work place and if applicable owned and operated spaces</li> </ul>

### Best practice examples

**Saint-Gobain:** Have developed a test kit called MC350 which measures the indoor environment such as acoustics and lighting. This can be linked to the smart phones of employees and customers and in doing so gathers large volumes of health statistics which can be used to improve the working environment.

**Laing O'Rourke:** Were presented with a Silver Award in Mind's second annual Workplace Wellbeing Index for their ongoing commitment to create a positive culture around mental health and supporting employee wellbeing. This achievement is in part driven through the 60 mental health champions across the business.



## Socio-economic impact

Business case for taking action	Progress since 2017	Areas for further improvement	Call to action
<ul style="list-style-type: none"> <li>By 2040, private rents in England could rise by 90% in real terms since 2008, pushing almost 50% of private renters into poverty<sup>13</sup></li> <li>More than two-thirds of local authorities and housing associations say delivering social value has led to better service delivery and community relations and half say it has led to cost savings<sup>14</sup></li> </ul>	<ul style="list-style-type: none"> <li>In 2018, 52% committed to measure and take action to increase social value and 48% linked their strategy to the UN Sustainable Development Goals (UNSDGs). In 2017, 37% committed to contribute positively towards society and 23% linked their strategy to the UNSDGs</li> </ul>	<ul style="list-style-type: none"> <li>2% are not planning a public commitment around social value</li> <li>16% have no current plans to align their strategy to the UNSDGs</li> <li>16% have no current plans to measure the financial value derived from sustainable business activities</li> </ul>	<ul style="list-style-type: none"> <li>Measure and take action to increase social value</li> <li>Link organisational strategy to the UNSDGs</li> <li>Measure and publicly report the commercial value derived from sustainable business activities</li> </ul>

### Best practice examples

**Peel and Land Property Group:** In March 2018 they launched their annual CSR metric to measure the economic, environmental and social value of their activities in connection with the UNSDGs. They have also formed a partnership with The University of Salford to undertake a social value study of MediaCityUK.

**Hanson:** Are corporate patrons of CRASH, the construction industry charity which provides accommodation for the homeless. Last year they donated construction materials for a number of projects including resurfacing the car park at St Catherine's Hospice in Crawley, West Sussex.

## Next steps for UKGBC and its members

UKGBC is working to support its members on their sustainability journey through a variety of programmes, including *Advancing Net Zero*, which helps our members mitigate the impacts of climate change. We also recognise that zero carbon buildings will not stop climate change entirely and the built environment needs to adapt if it is to maintain comfortable building temperatures as well as safeguard against flooding and water scarcity. We have therefore increased our work on *Climate Resilience*.

The industry is shifting towards a circular economy approach to retain resource value and reduce waste, as such our *Circular Economy* programme focuses on creating practical guidance for mainstream application.

In line with Defra's public consultation on mandatory policy for biodiversity net gain and the coming Environment Bill, UKGBC is looking at how we can further support our members on the topic of nature and biodiversity. Our *Cities* programme addresses the health, wealth and quality of life inequalities which exist most prevalently in cities.

### Insight

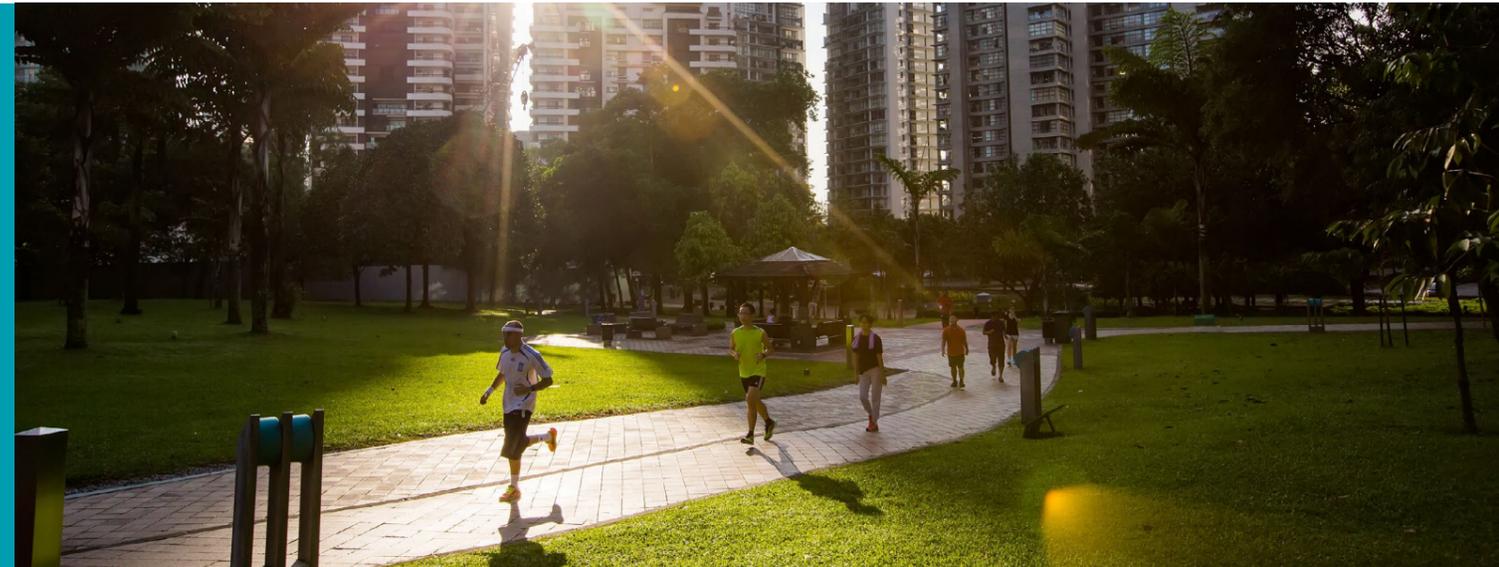
Climate change is a real threat that poses challenges to all businesses. Canary Wharf Group has decided to tackle this by adopting a long-term strategic planning approach that will help our Estate become a resilient and thriving place for people to work, live and relax in. As we begin our journey into the residential market, this is all the more relevant to our business where we are focusing our attention on ensuring that the health and wellbeing of both people and biodiversity is at the fore of what we do. We have done this through a number of initiatives, including our innovative Biodiversity Action Plan, our commitment to becoming the world's first plastic free commercial centre and refining our responsible procurement strategy to include specific benchmarks on our major building materials.

We also carry out early design climate change workshops on each of our buildings to ensure that due consideration is given to these impacts and decision making is influenced early on. We see adapting to climate change not only as a necessity, but also as an opportunity to improve our Estate, and become leaders through sharing our experiences with the wider sector.

**John Garwood**  
Managing Director/Group Company  
Secretary, Canary Wharf Group

# 1. Introduction

This is our third annual Leading the Way report. It highlights the findings of our Gold Leaf member Sustainability 360 Review, conducted over the summer of 2018. Across UKGBC's five key areas we reviewed and analysed the commitments of our Gold Leaf members and collected best practice examples. This report identifies the future trends and business case for the built environment and why change is needed, sets out the strategic commitments of members, and examines the positive progress being made as well as where further progress is required. It provides insights for how organisations within the built environment can transition towards more sustainable business practices and how UKGBC is working with its members to make this possible.



## Purpose of the Sustainability 360 reviews

- Enable UKGBC to better understand our Gold Leaf members' sustainability commitments against our vision for a sustainable built environment
- Demonstrate continual progress and improvement within Gold Leaf member organisations
- Enable members to compare their sustainability commitments with other businesses aspiring to leadership in the built environment
- Allow UKGBC to understand where we can better help our members progress towards becoming more sustainable

## Scope of issues assessed

This year we have again used the five key areas covered by UKGBC's vision as the framework on which to assess members' sustainability commitments.

Theme	We assessed member commitments within the five key impact areas	
 Climate change		Carbon reduction targets and the future impacts of climate change on the business
 Resource use		Waste elimination and the move to a circular economy
 Nature and biodiversity		Biodiversity targets and strategies and membership of the Natural Capital Coalition
 Health and wellbeing		Commitments to measure and report health and wellbeing in occupied and owned space
 Socio-economic impact		Social value measurement and improvement action, alignment to the UNSDGs and measurement of business value of sustainable business activity

Since 2017 we have conducted a deep dive survey into a specific area to understand the challenges and opportunities for our members and where UKGBC can support further progress. This year the focus was on nature and biodiversity, a report of the findings can be found on the [UKGBC website](#).

## Analysis and reporting

The research underpinning this report was carried out in summer 2018 through Gold Leaf member surveys and light desktop research using publicly available documents and websites. UKGBC has analysed the aggregated findings for the Gold Leaf member community together with best practice examples as supplied by Gold Leaf members.

In recognition of the varied responsibilities and potential impacts of the businesses within our Gold Leaf community, we have classified members into four peer groups:

- **Clients** which include investors, Real Estate Investment Trusts (REITs), property companies, developers, housebuilders and major occupiers
- **Advisors** which include architects, engineers, agents, and multi-disciplinary consultants or advisors
- **Contractors** which include tier 1 contractors and companies providing construction services
- **Product manufacturers** which include suppliers of products or materials used in the building lifecycle

## 2. Business case for taking action

Predictions for our planet and society based on current trends provide some worrying statistics. The built environment plays a significant role in creating many of the impacts and will itself be significantly affected by the outcomes. Forward thinking businesses are assessing these in relation to their business models and realigning their purpose and mission in order to operate successfully well into the future. Here we provide an overview of these trends which highlight potential long term risks for business operation and we have captured evidence of the business case for taking action and how this is contributing towards more sustainable progress.

### Climate change

- If greenhouse gas emissions continue at their current rate, average global temperatures could increase by over 4°C by the end of the century, possibly by as much as 4.8°C<sup>15</sup>
- UK summer temperatures could regularly reach 38°C by the 2040s<sup>16</sup>. If no action is taken to adapt to these conditions, there could be 7,000 heat-related deaths every year in the UK by 2050<sup>17</sup>
- Companies who are actively managing their carbon emissions and planning for climate change enjoy 18% higher return on investment than companies that aren't, and 67% higher than companies that refuse to disclose their emissions<sup>18</sup>
- Energy efficiency is being embraced by companies as a critical competitive advantage. A research survey of investors by Energy in Demand International found that 93% have invested their funds in energy management programmes over the last three years, reinforcing the trend that businesses are allocating a greater percentage of their capital budgets to energy management. These funds represent about 18% of their total capital budgets, compared to 12% in 2014. The largest proportion since the study's inception<sup>19</sup>

UK summer temperatures could regularly reach **38°C** by the 2040s



### Resource use

- Global extraction of primary materials is expected to triple by 2050<sup>20</sup>
- By 2100, the growing urban population will be producing three times as much waste as it does today<sup>21</sup>
- The price of materials used in construction increased 4.9% from May 2017 to May 2018, continuing a persistent upwards trend<sup>22</sup>. The departure of the UK from the European Union is expected to further increase the cost of importing materials
- 13% of products delivered to construction sites are sent directly to landfill without being used. UK construction industry sends 36 million tonnes of waste to landfill sites each year<sup>23</sup>
- The market for a circular economy is growing and it is estimated that over the next 10 years, this will boost economic growth by up to 4%<sup>24</sup>

Global extraction of primary materials is expected to **TRIPLE** by 2050

**13%** of products delivered to construction sites are sent directly to landfill without being used



## Nature and biodiversity

- Unless the present threats to species are removed the world will enter an anthropogenic induced sixth mass extinction event within a few centuries<sup>25</sup>
- It is projected that by 2030, global urban land cover will further increase by 430,000 km<sup>2</sup> to 12,568,000 km<sup>2</sup>. This expansion is the primary cause of species extinction and habitat loss
- Research suggests natural space can increase property and land values by as much as 25%<sup>27,28</sup>
- Developments with biodiversity strategies have a greater chance of planning approval from local authorities



Unless the present threats to species are removed the world will enter an anthropogenic induced sixth mass extinction event within a few centuries

## Health and wellbeing

- The annual death toll from outdoor air pollution could double to 6.6 million globally by 2050 if no new anti-pollution measures are put in place<sup>29</sup>
- By 2030, there will be approximately two million more adults in the UK with a mental health problem<sup>30</sup>. It is estimated that the direct cost of employee absence (due to work days lost) to the economy in the UK amounted to over £14 billion in 2012<sup>31</sup>
- Companies that take proactive steps to manage and promote employee wellness and engagement can improve their financial performance by as much as 10%<sup>32</sup>. Health check programmes at work have been found to reduce absenteeism and physically active workers take 27% fewer sick days<sup>33</sup>
- 90% of those surveyed would like a home that does not compromise their health and wellbeing. Almost 30% of all those surveyed (buyers and renters combined) would be willing to pay more for such a home. The figure is slightly higher for buyers as opposed to renters<sup>34</sup>



It is estimated that the direct cost of employee absence (due to work days lost) to the economy in the UK amounted to over £14 billion in 2012

## Socio economic impacts

- The proportion of wealth owned by the richest 1% of the global population could increase from nearly 20% in 2017 to more than 24% in 2050<sup>35</sup>. In the UK, the richest 1% of households already own 24% of the UK's wealth<sup>36</sup>
- By 2040, private rents in England could rise 90% in real terms since 2008, pushing almost 50% of private renters into poverty<sup>37</sup>
- Better designed cities could save our society and the UK economy an estimated £15.3bn by 2050 – and make us all happier and healthier<sup>38</sup>
- More than two-thirds of local authorities and housing associations say delivering social value has led to better service delivery and community relations and half say it has led to cost savings<sup>39</sup>



Better designed cities could save our society and the UK economy an estimated **£15.3bn by 2050** – and make us all happier and healthier



# 3. Climate Change



## Leadership insight

"Climate change is happening. The buildings we design need to be fit for purpose throughout their whole lifespan, which can be 50, 100 or more years. We design buildings with a lifespan of 50 to 100+ years. We need to ensure that these are fit for purpose on year one but also year 50 or 100 or more. This is why climate change adaptation is one of our six impact areas in our new Sustainability Roadmap which will guide our business and industry over the next decade. We have set ourselves the stretching goal of 95% of our global projects working to an agreed climate change scenario by 2025. All this is happening whilst we do our bit to avoid the levels of climate change that the planet is currently heading towards, for example we have also set ourselves the target of being carbon neutral by 2020 and carbon positive by 2025."

Tomás Neeson, Partner, Cundall

Gold Leaf members have the following commitments in place in relation to mitigating and adapting to climate change.

Mitigation	Adaptation
<b>14%</b> have publicly adopted a verified science-based carbon reduction target	<b>24%</b> are publicly reporting the future impacts of climate change on their business
<b>20%</b> have set a public commitment to adopt a verified science-based carbon reduction target	<b>40%</b> are calculating the future impacts of climate change on their business
<b>72%</b> have set a public carbon reduction target	<b>72%</b> are mitigating the risks of future climate change impacts on their business
<b>10%</b> have no public commitment to a carbon reduction target	<b>12%</b> have no commitment to address climate change impacts on the business

Gold Leaf members who have adopted science-based targets



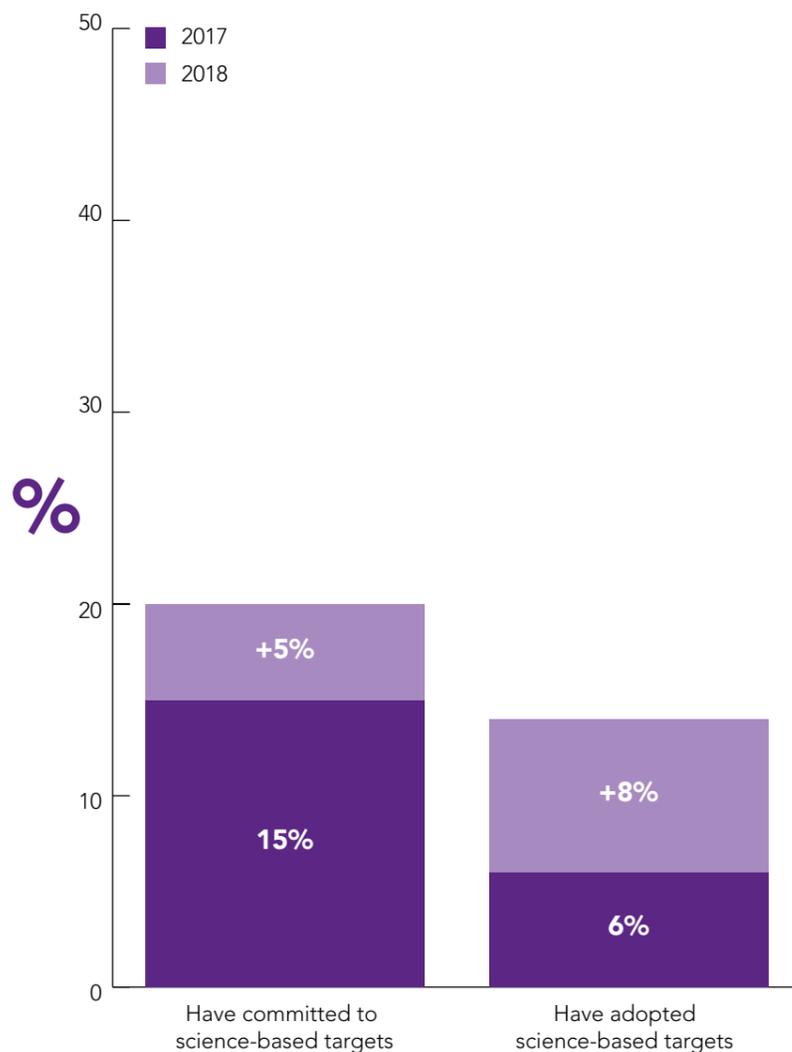
### Gold Leaf member progress

We are seeing a gradual increase in members committing to and adopting science-based targets however overall numbers remain low considering the importance of maintaining temperature increases below 1.5°C. A large number of organisations have carbon reduction targets in place and we hope to see increasing numbers commit to the [World GBC Advancing Net Zero commitment](#), launched in September 2018.

Whilst a large number of organisations are mitigating the risk of future climate change, fewer are calculating and reporting the potential impacts. Disappointingly, there are still a number of organisations who have no commitment to address climate change impacts on their business. We believe that reporting the potential impacts and adaptation measures increases awareness within the market and drives investment towards long term sustainable options that will survive in a changing climate.

### Climate change

Commitments in place to mitigate climate change from 2017 to 2018



## Best practice examples

### AECOM

Provide their clients with climate adaption services to help them understand the potential vulnerabilities and support initiatives that increase resilience. AECOM have partnered with IBM to develop the first-of-its-kind Disaster Resilience Scorecard and Disaster Resilience Survey for small and mid-sized businesses to benchmark disaster preparedness and increase overall resilience. They also provide strategic advice to the Rockefeller Foundation's 100 Resilient Cities.

### AkzoNobel

To achieve their commitment towards science-based targets they aim for carbon neutrality by 2050. One of the steps taken to achieve this has been joining the RE100 initiative which commits to 100% renewable energy by 2050. Another measure has been to introduce carbon pricing into relevant investment decisions as well as merger and acquisition initiatives. These measures drive further awareness of the environmental and future impacts of major decision-making. Investment decisions often include the impacts of a cradle-to grave carbon footprint cost of €50 per ton. With the business benefits including de-risk, carbon pricing has been used by them in seven major appropriation requests.

### Heathrow Airport

Aspire to 'decouple' growth from carbon emissions in the development and lifespan of the proposed new runway. This is to be achieved in part through new aviation technology, carbon trading, incentivising suppliers to lower carbon practices and subsidising public transport.

### Willmott Dixon

Through Willmott Dixon's Carbon Management Plan they have cut energy use, resulting in a saving of nearly £3m in 2014. By continuing to implement the initiatives of this strategy they estimate that they could save a further £3m a year by 2020. Moreover, to compensate for the difficulties in entirely eradicating their carbon emissions in the foreseeable future they have decided to offset all remaining emission.

## 4. Resource use



### Leadership insight

"As part of our commitment to be the first developer to deliver truly carbon positive, energy positive and zero waste projects by 2020, whilst aspiring to attain 20% cost reductions from our current benchmarks, we have come to understand that circular economy thinking and re-use are critical in achieving this goal.

Initially undertaking detailed site audits to understand exactly which, and the quantities of, materials we have that make up our existing buildings before designing a scheme is key to achieving the necessary reductions in waste. The process of demolition has been removed from any of our construction plans and, instead, replaced with deconstruction. This has contributed towards our strategy for a zero-skip policy, by re-using all of the existing buildings materials in some capacity, and designing our new buildings based on the known sizing of proposed materials, amongst other things, we are seeing substantial cost savings alone from not needing to use skips, having to procure materials allowing for wastage or off-cuts, or disposing of any site materials."

Ben Spencer, Managing Director, gs8

Gold Leaf members have the following commitments in place in relation to eliminating waste and maximising resource efficiency

- 40%** have a public commitment towards a circular economy
- 12%** have set a public commitment to zero waste
- 40%** have a public commitment to zero waste to landfill
- 56%** have a public commitment to a waste reduction target
- 8%** have no public commitment to a waste reduction target

Gold Leaf members who have a commitment towards a circular economy



ARUP



CUNDALL



MULTIPLEX



TATA STEEL

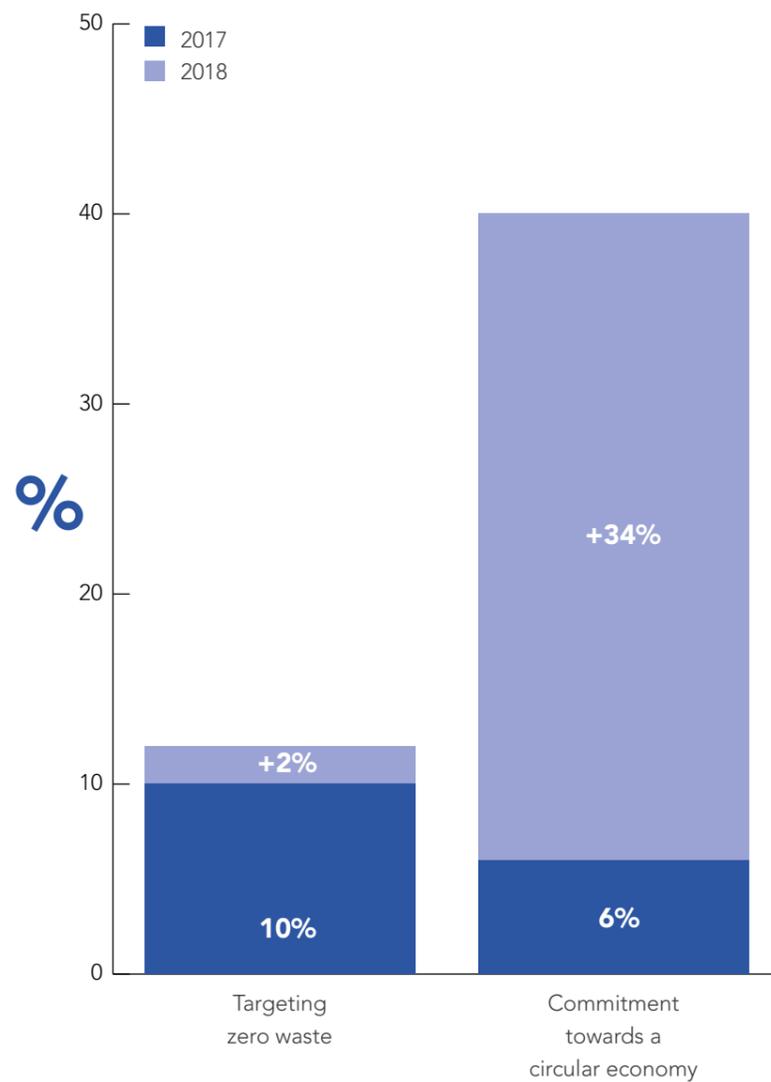


### Gold Leaf member progress

Whilst there are small increases in the number of organisations committing to zero waste and circular economy, the overall picture suggests there is much room for improvement by the industry. The majority of organisations are setting zero waste to landfill and waste reduction targets, which are not as ambitious as required if we are to move towards implementing circular principles.

### Resource use

Commitments in place relating to eliminating waste and a circular economy



## Best practice examples

### Arup

Have partnered with the Ellen MacArthur Foundation working to increase knowledge sharing in the built environment around resource use through the Circular Economy 100. Through this they have co-authored an industry leading report on 'First Steps Towards a Circular Built Environment'. Arup have also partnered with Google and others on the Circularity Lab to develop full-scale demonstration buildings in New York and San Francisco which highlight the practical applications for circular design in the built environment.

### Marks & Spencer

Aim that by 2022 all their packaging will be "widely recyclable". To do this they plan to use just one polymer in packaging, to date they have transitioned from 11 in 2007 to just 4. Additionally, they are reducing the instances of single use plastic, subsequently they plan to replace 75 million plastic pieces of cutlery with FCS wooden alternatives.

### Mitsubishi Electric

In 1999, they established their first recycling operation, Hyper Cycle Systems. This was to clean and treat recovered materials and resulting waste. This was later developed into Japan's leading home appliance recycling system. The Mitsubishi custom developed automated process recovers reusable metal, glass and plastic materials on mass. This feeds granulated plastic into their Green Cycle Systems which separates them into reusable plastics. These systems have led to Mitsubishi's recycling rate increasing by 64%.

### Multiplex

Has target of zero waste to landfill and to optimise resource efficiency by 2025. They believe that value comes from not generating waste in the first instance rather than just diverting it from landfill. To ensure this they design out waste at an early stage of the design process and design in recycled content. This is achieved in part through reducing packaging and making designs more efficient. Part of this process is to ensure buildings are fitted with the facilities for sustainable waste streams.

# 5. Nature and biodiversity



## Leadership insight

“Biodiversity at Canary Wharf comprises more than meets the eye. Through time, our urban design has created a suitable living environment for native and threatened species of plants and animals and their establishment has taken place alongside the thriving commercial world of the Canary Wharf Estate. We involve the local community as much as possible to celebrate the ecological diversity on our Estate. We do that with campaigns like our popular annual Wildlife Photography Competition, which is going from strength to strength. Underpinning this is a long-term Biodiversity Action Plan (BAP), developed by ecologists, which we have recently updated to better understand the ecological value of the Estate. By defining key habitats and species, we are ensuring that current and future developments integrate this knowledge into their design, maximising opportunities to create and augment green corridors that link with the rest of Tower Hamlets and east London. Through our BAP, we are working to ensure that we create safe and healthy ecosystems and amenities that promote integrated, pleasant and liveable public spaces where biodiversity and leisure meet, both now and in the future.”

Phil Tweddle, Co-Managing Director, Canary Wharf Management

Gold Leaf members have the following commitments in place in relation to embracing and restoring nature and promoting biodiversity

- 22%** have a public commitment to a net gain biodiversity target
- 8%** have a public commitment to a no net loss biodiversity target
- 44%** have a nature and biodiversity strategy in place
- 8%** are a member of the Natural Capital Coalition
- 40%** have no commitment to nature and biodiversity

Gold Leaf members who have a commitment towards net gain biodiversity

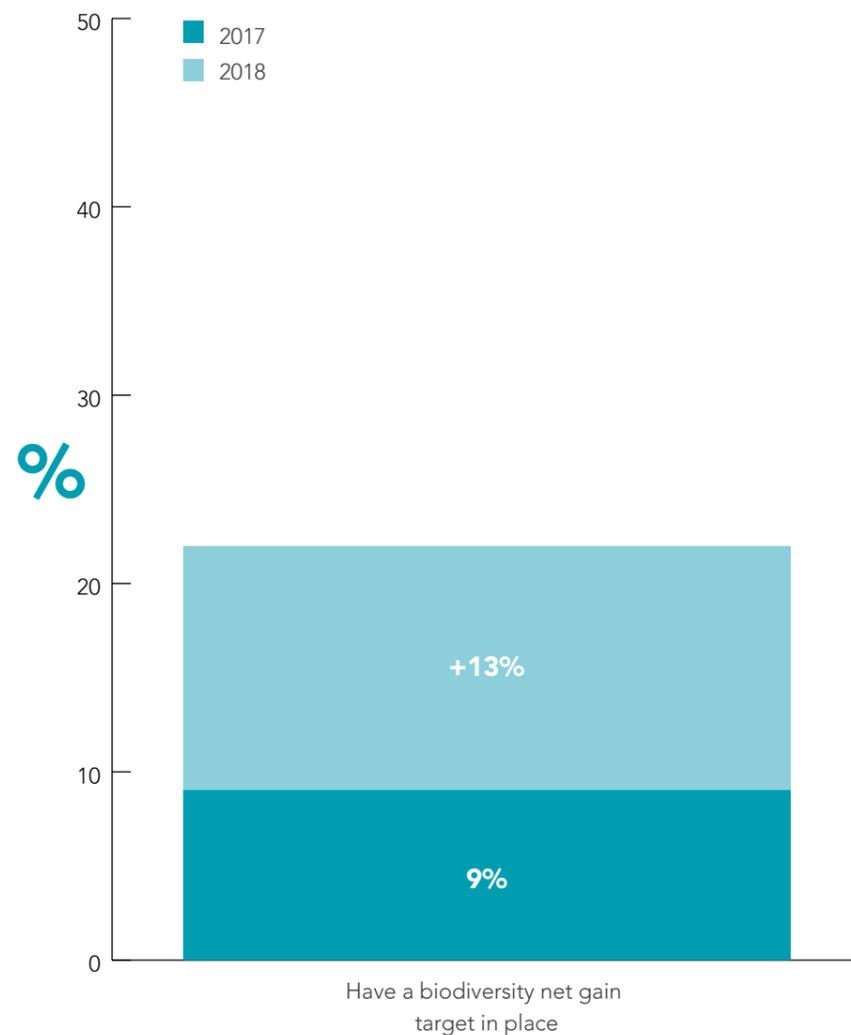


### Gold Leaf member progress

We are seeing a significant increase in commitments towards biodiversity net gain. However, 40% of Gold Leaf members still have no commitment to protect nature and promote biodiversity. The expected mandatory biodiversity net gain requirements for new developments and infrastructure as well as the Environment Bill are likely to result in greater focus being placed on this impact area. Moreover, there are strong links between this and UKGBC's other impact areas, we therefore expect organisations to increase their work to protect and enhance nature and biodiversity.

### Nature and biodiversity

Commitments in place in relation to embracing and restoring nature and promoting biodiversity



## Best practice examples

### Aggregate Industries

Use biodiversity management plans on all active extractions sites, these plans work to protect, restore and enhance the biodiversity habitats and species on and around their sites. Additionally, across their landholdings they create wetlands, plant trees and provide natural landscapes and habitats for wildlife. They have ten extraction sites certified by The Wildlife Trust's Biodiversity Benchmark. Their impact on nature and biodiversity is monitored using a Biodiversity Indicator Reporting System (BIRS). The BIRS methodology requires annual surveys of site habitats and generates a numerical biodiversity score per site, overtime the aim is to increase this score.

### BRE

To increase the nature and biodiversity at their Watford site they implemented a biodiversity trail and wildflower meadow. In addition to this, they have a woodland management plan which protects bats and great crest newts onsite. These ecological protection and enhancement measures are supported by working closely with landscaping partners and volunteers. Moreover, as part of BRE's business offering they have developed their service to include the monitoring, measurement and enhancement of biodiversity.

### Landsec

Aim to achieve a 25% biodiversity net gain across their five sites which offer the greatest potential by 2030. To achieve this, in partnership with The Wildlife Trust they have developed a methodology to measure biodiversity on all sites along with net gain plans for several. This methodology allows them to prioritise effort and investments for maximising biodiversity.

### Skanska

Are developing a deeper understanding of how their operations impact nature and biodiversity and identifying what measures can be taken to reduce and mitigate their effect. Through their environmental management plans, work is planned around protected species on or near development sites. Moreover, their projects are proactively working to create biodiversity net gains. Skanska is one of just 50 organisations to support development on the Natural Capital Protocol, a standardised framework to measure and value their impacts and dependencies on nature.

## 6. Health and wellbeing



### Leadership insight

"Everyone wants and deserves to go home safe after every day at work and it is our goal to ensure this. We prioritise safety in the workplace through an ongoing programme of awareness, monitoring, reporting and introducing the tools and procedures needed to realise that goal. Our people are our most valuable asset and we want to ensure they are protected. Workplace accidents can have a devastating impact on an individual and will also affect co-workers, family and friends. We are committed to creating an environment in which we all work as a team to make sure safety always comes first.

Our sustainability strategy is aligned with the UN's Sustainable Development Goals. We have prioritised 10 SDGs that are most strategically aligned to our business and on which we can have the greatest impact. Our commitment to safety in the workplace is directly linked to goal no.8, 'Decent Work and Economic Growth'."

Darryl Matthews, Managing Director, Rockwool

Gold Leaf members have the following commitments in place in relation to optimising the health and wellbeing of people

**38%** have a public commitment to measure and report health and wellbeing for their own work place

**12%** have a public commitment to measure and report health and wellbeing in owned and operated spaces for example retail, offices, social housing

**28%** are developing a public commitment to measure and report health and wellbeing

**36%** are not planning a public commitment to measure and report health and wellbeing

Gold Leaf members who have a commitment towards measuring and reporting health and wellbeing for their own work place

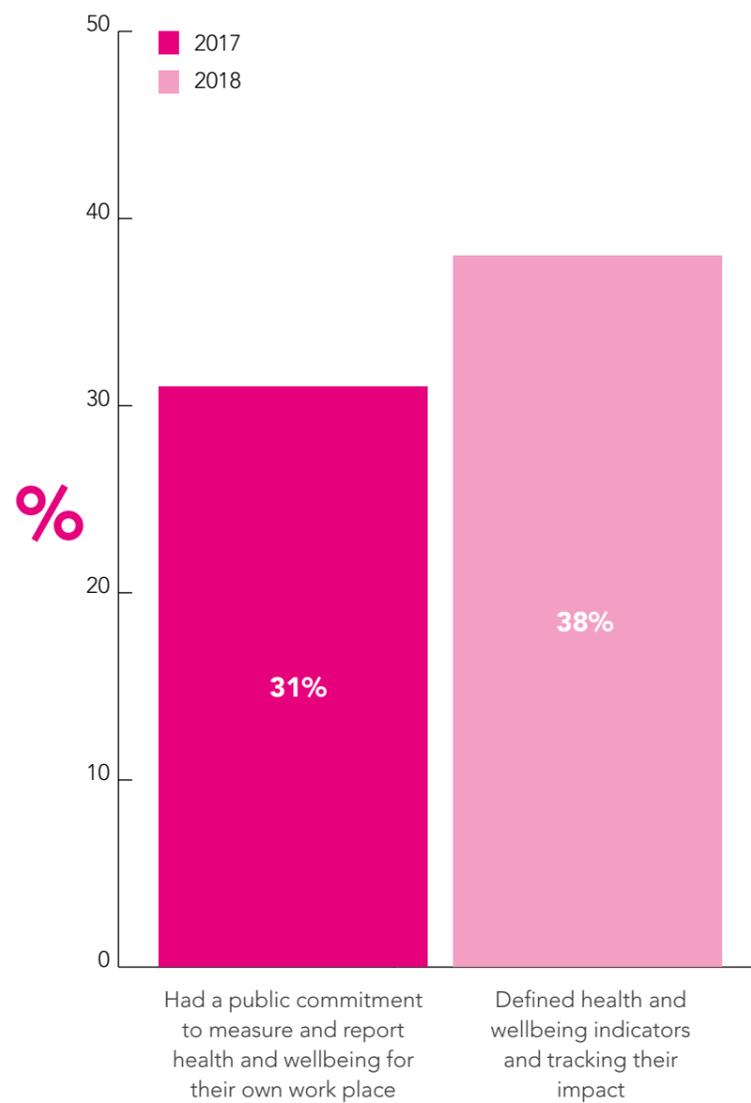


### Gold Leaf member progress

In 2018 we tracked different metrics compared with 2017, but we can see measurement of health and wellbeing is increasing slightly. However, disappointingly, there are still a significant number of members who are not currently measuring or reporting on health and wellbeing of staff and/or the space owned and operated by the organisation. With guidance available from World GBC & UKGBC for offices, retail and homes, we expect more measurement and reporting of health and wellbeing.

### Health and wellbeing

Commitments in place in relation to measuring and reporting on health and wellbeing



## Best practice examples

### Bruntwood

Their Neo project achieved gold accreditation from the WELL Building Institute. Here they implemented a range of measures from the air quality system to the use of low-VOC fixtures and fittings. This offered numerous business benefits in addition to health and wellbeing such as an increased competitive edge for recruitment.

### BuroHappold Engineering

Has joined the Complex Urban Systems for Sustainability and Health (CUSSH), which focuses on work in middle and high-income cities in the UK. The project aims to develop critical evidence on how to achieve the transformation cities need to address imperatives for population and planetary health. This project aims to engage with policy makers and give them the tools to make change. They are also developing a wellbeing strategy for the urban environment; the goal will be to create a public realm with significantly better support for health and wellbeing.

### Laing O'Rourke

Has an ongoing commitment to health and wellbeing in the workplace. This commitment has been recognised through being presented with a Silver Award in Mind's second annual Workplace Wellbeing Index for its ongoing commitment to create a positive culture around mental health and supporting employee wellbeing. This achievement is in part driven through the 60 mental health champions across the business.

### Saint-Gobain

Have developed a test kit called MC350 which measures the indoor environment such as the acoustics and lighting. This information can then be linked to the smart phones of employees and customers. Through this Saint-Gobain can gather large volumes of data and health statistics to then create and take actions forward to improve the working environment of their buildings to improve health and wellbeing.

# 7. Socio-economic impact



## Leadership insight

"Our purpose is to deliver lasting commercial and social benefit in creating great places for people to visit, live and work in. To achieve this ambition, we developed an approach called 'Living cities' which guides and inspires all our activities. Over the last 10 years this framework has ensured that everything we do creates visible and lasting outcomes that positively affect communities, neighbourhoods and cities.

However, like many property companies, we have historically failed to describe how we deliver value both in financial terms and to society. So we are seeking to more openly explain our purpose and our point of view to build greater trust between the property industry and the public."

Amelia Staveley, Director of Development and Placemaking,  
Grosvenor Britain & Ireland

Gold Leaf members have the following commitments in place in relation to creating long-term value for society and improving quality of life

Increasing social value	Aligning to UNSDGs	Financial value derived from sustainable business
<b>52%</b> are measuring and taking action to increase social value	<b>48%</b> have aligned their strategy to the UN Sustainable Development Goals (UNSDGs)	<b>24%</b> are measuring and publicly reporting the financial value derived from sustainable business activities
<b>56%</b> are taking action to increase social value	<b>26%</b> are working to align their strategy to the UNSDGs	<b>26%</b> are measuring, but not publicly reporting
<b>42%</b> are assessing which activities create social value for the relevant local communities	<b>16%</b> have no current plans to align their strategy to the UNSDGs	<b>24%</b> are planning to measure
<b>42%</b> are developing an understanding of social value		<b>16%</b> have no current plans to measure
<b>2%</b> are not planning a public commitment around social value		

Gold Leaf members who have a commitment towards measuring and taking action to increase social value

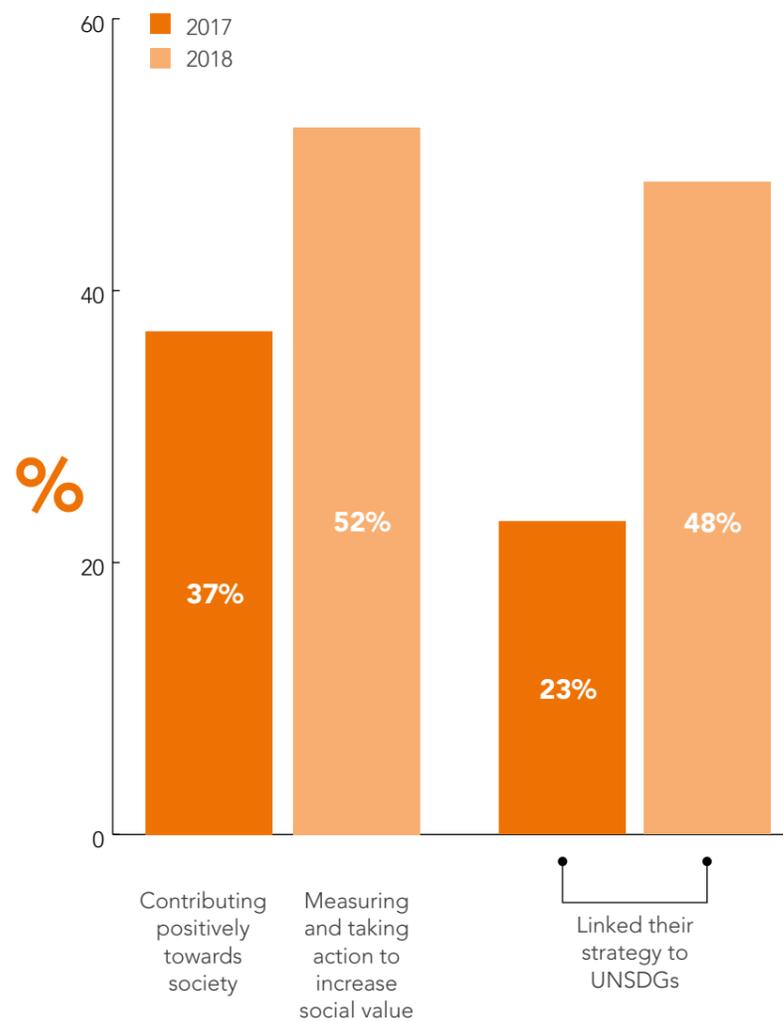


### Gold Leaf member progress

The metrics measured between 2017 and 2018 vary, however, it is clear that increasingly members are conscious of their impact on society. The majority have committed to measure and take action to increase social value, with only a small proportion not looking at this area at all. We are pleased to see a big increase in the number of members linking their strategy to the UNSDGs. There has been a large increase in the number of organisations that are measuring and reporting on the financial value derived from sustainable business activities and we look forward to working with these businesses to collate and share this evidence.

### Socio-economic impact

Commitments in place relating to socio-economic impacts



## Best practice examples

### Atelier Ten

In New York, Director Ben Shepherd has been working with the youth outreach programme Green City Force, to train and find work experience for young people to reduce greenhouse gas emissions and find careers in the green economy. This also includes performing free energy audits for low-income families, allowing them to cut the costs of their utility bills.

### Hanson

Are corporate patrons of CRASH, the construction industry charity which provides accommodation for the homeless. Last year they donated construction materials for a number of projects including resurfacing the car park at St Catherine's Hospice in Crawley, West Sussex.

### Peel and Land Property Group

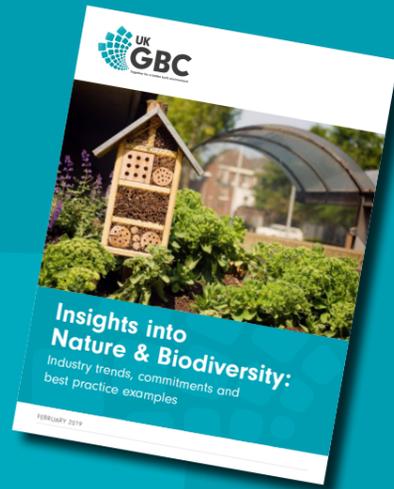
In March 2018, they launched their annual CSR metric to measure the economic, environmental and social value of their activities in connection with the UNSDGs. They have also formed a partnership with The University of Salford to undertake a social value study of MediaCityUK.

### McLaren Construction Group

Have partnered with Place2Be to work with primary and secondary schools across the UK. Place2Be is a charity which provides services to children to support them in coping with emotional and behavioral difficulties. This allows the children to reach their full potential through helping them deal positively with the challenges they face. This has been achieved with McLaren at their Nile Street project.

## 8. Next steps for UKGBC and its members

As part of the Sustainability 360 research, we carried out a deep dive survey of Gold Leaf members' approach to nature and biodiversity called [Insights into Nature & Biodiversity](#). This research will help us understand how we can further support our members to work towards biodiversity net gain.



*"This review recognises some progression towards a sustainable built environment but there are urgent, significant challenges ahead. It's crucial that our members and the wider industry adopt the progressive next steps outlined in order to champion an agenda which transforms from doing less environmental harm to one that restores and regenerates the environment while improving people's lives."*

**Julie Hirigoyen**  
Chief Executive, UKGBC

The severity of human impacts on the planet are continually increasing, as are the number of social issues which require attention. There is growing confirmation that investors, customers, employees, governments and regulators are demanding businesses play a stronger role in solving these problems, and that the built environment is on the front line. The result is that an increasing number of companies are recognising the business case for having a positive impact on the natural environment and society (see UKGBC's report [Capturing the Value of Sustainability](#)).

The Intergovernmental Panel on Climate Change (IPCC) 'Special report on global warming of 1.5°C' has made it clear that urgent and dramatic action is required<sup>40</sup>. One of the findings is that the risks and impacts from climate change are significantly reduced if we can limit global warming to 1.5°C<sup>40</sup>. This requires a reduction in CO<sub>2</sub> emissions of about 45% within the next 12 years, and zero emissions around 2050<sup>40</sup>. This is why UKGBC has launched its [Advancing Net Zero](#) programme, through which we will work with our members and other stakeholders to identify and create the frameworks, tools and policies required to achieve a net zero carbon built environment. Regardless of the scale of mitigation, the

climate is and will continue to change and buildings and infrastructure must be able to adapt to the new and predicted threats from climate change. We have therefore increased our work on [Climate Resilience](#), with our first project nearing completion.

Catalysed by the Blue Planet II television series, 2018 saw a huge shift in the public's perception towards waste and resource use. Our [Circular Economy](#) programme is the result of last year's Sustainability 360 deep-dive survey and is focussing on creating practical guidance for mainstream application by clients to enable their supply chains to deliver a circular built environment approach, due April 2019.

Cities are where health, wealth and quality of life inequalities are most keenly felt and so the UKGBC [Cities](#) programme continues to bring together city policy makers and our members on key workstreams including sustainability in new homes and social value measurement.

Many of the solutions to these industry challenges already exist and UKGBC is continuing its work to crowdsource them and provide a platform to connect innovators with investors and those companies interested in using their innovation.

The findings of this year's 360 surveys demonstrate that our Gold Leaf members are the forefront of this action, for example there is an increasing number of Gold Leaf members adopting science-based targets and setting out a commitment to biodiversity net gain. However, despite this positive trajectory, the scale of the challenges requires an industry step change in both ambition and action. In line with UKGBC's vision we want to see the following actions from our members:

- Set a commitment to adopt science-based targets
- Sign up to the World Green Building Council's Advancing Net Zero commitment
- Publicly disclose the commercial risks and opportunities of climate change to the business
- Aim for zero-waste and set bold ambitions around the Circular Economy
- Sign up to pilot the UKGBC Circular Economy task group guidance (due in April 2019)
- Adopt biodiversity net gain targets for development and infrastructure projects
- Set a public commitment to measure and report health and wellbeing for the work place and if applicable owned and operated spaces
- Measure and take action to increase social value
- Link organisational strategy to the UNSDGs
- Measure and publicly report the commercial value derived from sustainable business activities

## 9. UKGBC Gold Leaf Members

Our Gold Leaf members have a combined turnover of over £150bn, employ approximately 50,000 staff and strive to be sustainability leaders. They have ambitious environmental aspirations and a strong social purpose. They join UKGBC to accelerate their adoption of sustainable business practices in addition to learning from and challenging one another to be bolder and more ambitious.

Our goal is to enable them to demonstrate their commercial success through the leading sustainability practices they adopt. We work very closely with them in realising the UKGBC vision, calling upon them for advice, collaboration and support.

To find out more about becoming a Gold Leaf member please see our website or contact [info@ukgbc.org](mailto:info@ukgbc.org)

### Clients



### Consultants



### Contractors



### Product manufacturers



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UK Green Building Council  
The Building Centre  
26 Store Street  
London WC1E 7BT

T 020 7580 0623  
E [info@ukgbc.org](mailto:info@ukgbc.org)  
W [ukgbc.org](http://ukgbc.org)

