



Insights into Nature & Biodiversity:

Industry trends, commitments and
best practice examples



Foreword

Our Gold Leaf members are ramping up their ambitions and commitments to create a greater number of better quality habitats. Ahead of them is a significant opportunity to incorporate nature and biodiversity into the fabric of buildings and infrastructure, not least for the intrinsic benefits but for the wider applications to climate resilience, health & wellbeing and social value.

To meet our clear and ambitious mission to radically improve the sustainability of the built environment, it is important to us that we understand where we can support our members in reaching their commitments for this often misunderstood and complex area.

Julie Hirigoyen
Chief Executive, UKGBC

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Insight

Our natural world is vital to human health, enjoyment and survival. However, throughout history we have depleted our natural capital without even noticing this invisible part of the balance sheet. The ecosystems upon which we depend are now so degraded worldwide that major investment is required to put nature in to recovery. This is what lies behind the Westminster Government's proposals for all developments to show 'net gain' in biodiversity and what is behind aspects of the Future Generations Act in Wales.

Whilst building and infrastructure will continue, a whole new outlook is required. Just as the Paris agreement aimed to re-set our interface with the Carbon cycle, so 2020's conference of parties to the Convention on Biological Diversity should be setting out ambitions for restoring our natural world. And just as the UK led the world with its 2008 *Climate Change Act* so the UK should lead the world with an ambitious Environment Act in 2019. Central to this should be a statutory requirement to map nature's recovery and so provide a visionary framework for investment by both the public and private sector. The corporate sector can take a lead. Thinking about nature up front, ideally before even buying land for development, and certainly as early design phases start, is essential if we are to reduce isolation of key habitats and give wildlife the space it needs to survive and thrive.

Stephanie Hilborne OBE,
Chief Executive, The Wildlife Trust

Executive summary

This report highlights the deep dive survey findings from our Gold Leaf member Sustainability 360 review, conducted over the summer of 2018. On the topic of nature and biodiversity we sought to uncover our Gold Leaf members’ commitments; best practice examples; the sources of pressure on them to do more; the barriers to going further; their industry partners and what more UKGBC can do to support them. This report also provides key insights on the state of nature in the UK, positive industry trends, the business case for nature, and a timeline of government policy and work.



Why change is needed

- Nature and biodiversity are essential to human health, wellbeing and survival
- Between 1970 and 2013, 56% of monitored species in the UK declined
- 15% of all UK wildlife is either threatened with extinction (13%) or is extinct already (2%)
- Biologists believe that a human caused sixth mass extinction event is now underway
- Defra are creating mandatory policy for biodiversity net gain for developments and infrastructure

Industry trend

- The industry is increasingly progressing towards biodiversity net gains as a means of halting the continued loss of nature and biodiversity across the UK

Positive progress

- In 2017 just 9% of UKGBC’s Gold Leaf members had committed to biodiversity net gain but by 2018 this level had increased to 22%
- In 2018, 8% of UKGBC’s Gold Leaf members had a public commitment to no net loss in biodiversity

Areas for improvement

- 40% of UKGBC’s Gold Leaf members have no commitment to protecting nature and biodiversity

BEST PRACTICE EXAMPLES

AGGREGATE INDUSTRIES

Use biodiversity management plans on all active extraction sites, to protect, restore and enhance the biodiversity 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).



BARRATT DEVELOPMENTS

Achieved a biodiversity net gain at their Deram Parke development near Coventry. It was not possible to do this entirely onsite, so to achieve their objective they financed a 30-year management plan created by the local council for a nearby ancient woodland.



LANDSEC

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.



1. Introduction to nature & biodiversity



THE STATE OF NATURE



Biologists now suggest that we are likely in a human caused sixth mass extinction event, something which would take millions of years to recover from³

Between 1970 and 2013:

- 58% of monitored species globally declined⁶
- 56% of monitored species in the UK declined⁷
- 47% of urban monitored species in the UK declined⁷

15% of all UK wildlife is either threatened with extinction (13%) or is extinct already (2%)⁵

Over half of the world's land had been converted for human use by 2009 of which 9.3% had occurred in the period between 1993 and 2009⁴

Species extinction rates are approximately 100-1,000 times greater than that of the expected background rate as a consequence of human activities^{1,2}

22,000

hectares of UK green space were converted into artificial surfaces, mostly housing, between 2006 and 2012. In total, a surface area twice the size of Liverpool⁸

- 14,000 hectares of farmland concreted⁸
- 1,000 hectares of wetlands drained⁸
- 7,000 hectares of woodlands felled⁸



For more statistics on the state of nature and biodiversity in the UK, check out our State of Sustainability Infographic www.ukgbc.org/biodiversity/

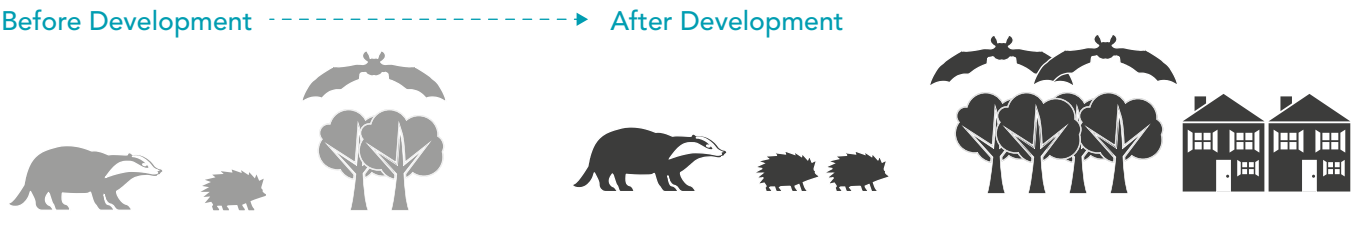


BIODIVERSITY NET GAIN

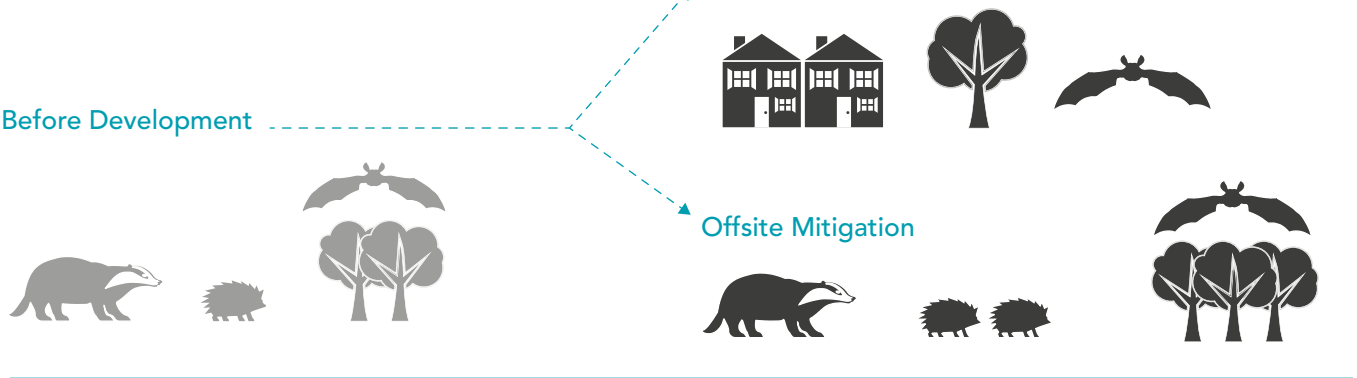
The current trend across industry and upcoming government policy is to move towards a biodiversity net gain approach as best practice. Defra defined this in their 2018 Biodiversity Net Gain consultation proposal as "...an approach to development that aims to leave the natural environment in a measurably better state than beforehand. This means protecting existing habitats and ensuring that lost or degraded environmental features are compensated for by restoring or creating environmental features that are of greater value to wildlife and people."⁹ This approach follows the National Planning Policy Framework mitigation hierarchy, as illustrated below in the context of achieving a biodiversity net gain. This hierarchy prioritises avoiding the impact, then minimising and restoring the impact onsite and lastly creating a new habitat elsewhere.¹⁰

BIODIVERSITY SCENARIOS FOR DEVELOPMENT

SCENARIO 1: Onsite Biodiversity Net Gain



SCENARIO 2: Offsite Biodiversity Net Gain



SCENARIO 3: Biodiversity No Net Loss



THE NEED FOR NATURE

Protecting and enhancing nature and biodiversity not only has inherent benefits, but also impacts across other key areas of sustainability.

| CLIMATE CHANGE | RESOURCE USE | NATURE & BIODIVERSITY | HEALTH & WELLBEING | SOCIO-ECONOMIC IMPACT |
|---|--|--|---|---|
| <ul style="list-style-type: none">Sequesters carbonReduces the urban heat island effectReduces flooding riskIncreases soil stability | <ul style="list-style-type: none">Food provisionWater storage and reuseConstruction material provision | <ul style="list-style-type: none">Increases genetic diversityIncreases species survival ratesImproves water and soil qualityReduces ambient noise | <ul style="list-style-type: none">Medicine provisionImproves mental and respiratory healthIncreases hospital recovery rateReduces stressImproves workplace productivity | <ul style="list-style-type: none">Recreation provisionIncreases land and property valueReduces crimeIncreases social cohesionFaster planning permission |

THE BUSINESS CASE FOR NATURE

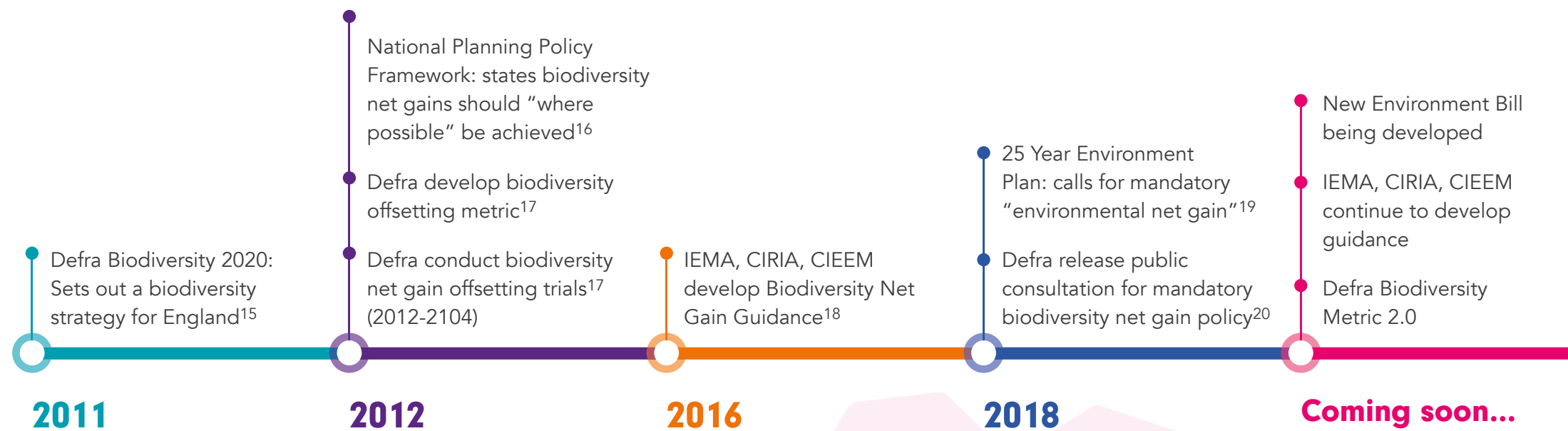
Natural capital is the stock of environmental resources which enable businesses to function. These resources sustain the economy, human health and culture. Nature and biodiversity have an intrinsic value to offer organisations, for example increased natural space has been shown to increase property and land values by as much as a quarter^{11,12}. The Wildlife Trust claim this increase is a consequence of more green space being attractive to home buyers and so yield a greater market value¹³.

The business benefits of developments with forward thinking strategies for nature and biodiversity include - a greater chance of being granted planning approval from local authorities, greater inward investment, reduced building energy costs, improved area for tourism and increased speed of property sales. Increasing biodiversity also improves a developer's reputation, which can attract new talented employees and reduce employee turnover^{13,14}.



GOVERNMENT POLICIES AND WORK

UK policy and initiative timeline



International

Germany and the US have had biodiversity policy in place for the past 40 years addressing net environmental gain, no net loss and net gain, among other policy requirements.



2. Insights from the UKGBC Gold Leaf membership

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



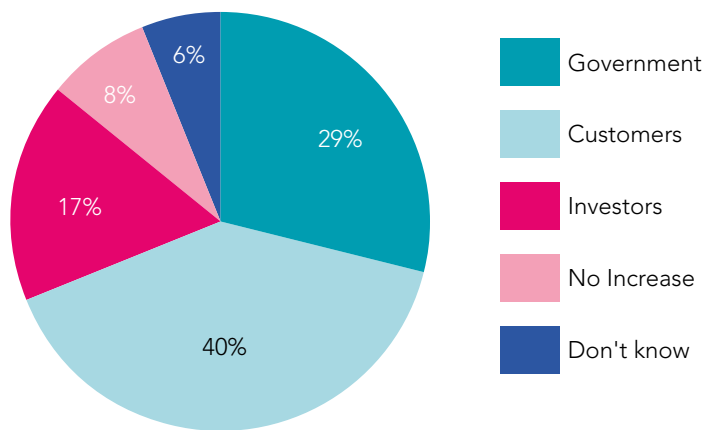
RESEARCH METHODOLOGY

Each year we conduct a deep dive survey into a specific area of sustainability to better understand the challenges and opportunities for our members and where UKGBC can support further progress.

This year's deep dive focused on nature and biodiversity. The research underpinning this report was carried out in summer 2018 via surveying UKGBC Gold Leaf members and undertaking light desktop research using publicly available documents and websites. On the topic of nature and biodiversity we sought to uncover our Gold Leaf members' commitments, best practice examples, the sources of pressure on them to do more, the barriers to going further, their industry partners and what more UKGBC can do to support them. This analysis was conducted as separate but complimentary research to the overall 360 Review covering Gold Leaf members' sustainability commitments, the findings of which will be presented in our Leading the Way Report due for publication in March 2019.

Whilst each organisation has a role to play in adapting their business model, this is undoubtedly a topic that requires systemic change with commitment and buy-in from all different players in the sector, partnerships and collaborations across industry sectors, and strong government intervention, at both national and international level.

SOURCES OF INCREASING PRESSURE ON GOLD LEAF MEMBERS TO RESTORE NATURE AND PROMOTE BIODIVERSITY



BARRIERS TO RESTORING NATURE AND DELIVERING BIODIVERSITY

Lack of financial methodology

Lack of government policy

Lack of client demand

Trade-offs with other sustainable designs

Internal skills shortages



GOLD LEAF MEMBER COMMITMENTS

8%

have a public commitment to a biodiversity no net loss target

22%

have a public commitment to a biodiversity net gain target

40%

have no commitment to nature and biodiversity

8%

have joined the Natural Capital Coalition

44%

have a nature and biodiversity strategy in place

BEST PRACTICE EXAMPLES

AGGREGATE INDUSTRIES:

Use biodiversity management plans on all active extractions sites, 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 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.



BARRATT DEVELOPMENTS:

Achieved a biodiversity net gain at their Deram Parke development near Coventry. It was not possible to do this entirely onsite, so to achieve their objective they financed a 30-year management plan created by the local council for a nearby ancient woodland.



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 efforts and investments for maximising biodiversity.



3. Next steps for UKGBC and its members



We are delighted to see that UKGBC’s Gold Leaf members are increasing their adoption of nature and biodiversity strategies and targets. Almost half have a strategy in place, 8% have a public commitment to no net loss and 22% have committed to biodiversity net gain, up from 9% in 2017.

However, 40% have no such commitments, but we expect this to change rapidly as 86% of our Gold Leaf members feel that the pressure is increasing on the industry to restore nature and promote biodiversity. Customers (40%) and government (29%) were the most commonly sighted sources of this pressure. The growing pressure from government is likely a reflection of the ambitions in the 25 Year Environment Plan around mandatory requirements for “Environmental Net Gains” and Defra’s biodiversity net gain consultation.

Increasing demand from customers reflects the strengthening business case for positive environmental and social impact and the fact that increasing nature and biodiversity has a strong link with other important sustainability areas. This includes health and wellbeing, social value and climate resilience (for more information see UKGBC’s report Capturing the Value of Sustainability).

If organisations within the built environment are to adopt increased commitments on this topic then they will need to overcome the barriers ahead. In our survey, 26% of members identified a lack of financial mechanisms to be the largest barrier, with lack of government policy and client demand the next most cited. This is slightly contradictory to findings regarding the sources of pressure, which is most likely due to the diversity of organisations within UKGBC’s membership.

UKGBC is currently in the process of identifying how we can best support our members, the wider industry and society around this vital impact area. To ensure our approach is meaningful and beneficial we will be reviewing the diverse range of suggestions made by our Gold Leaf members in the Sustainability 360 survey and will engage with our wider membership and other industry organisations.

We hope that this year many more of our members will adopt a public biodiversity net gain commitment and we look forward to working with them on this increasingly important topic.















































4. UKGBC Gold Leaf Members

Gold Leaf members are organisations aspiring to be sustainability leaders. They typically have ambitious environmental aspirations, and a strong societal purpose. They wish to join UKGBC to enable them to accelerate their adoption of sustainable business practices, and to learn from and challenge one another to be more bold and ambitious.

Our Gold Leaf members have a combined turnover of over £150bn and employ approximately 50,000 staff.

It is our ambition to enable them to demonstrate their commercial success through the leading sustainability practices they adopt. We work very closely with our Gold Leaf members in realising our vision, and they remain our first port of call for advice, collaboration and support.

To find out more about becoming a Gold Leaf member please see our website or contact Munish.Datta@ukgbc.org

| Clients | Consultants | Contractors | Product Manufacturers |
|--|---|--|---|
|              |                |          |          |

Note: The Gold Leaf members at the time of conducting the Sustainability 360's Review also included: Aberdeen Standard Investment, Balfour Beatty and ISG.

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Appendix

The tables below contain the full results from the 2018 Sustainability 360 survey questions and desktop research on nature and biodiversity.

The results have been split across the 4 peer groups and aggregated into an overall total. For the survey Gold Leaf members were asked to select the statements which best fit their organisation.

The number of Gold Leaf members in each group at the time of research consisted of 21 clients, 9 consultants, 11 contractors and 9 product manufactures.

QUESTION 1:
WHICH OF THE FOLLOWING APPLY TO YOUR ORGANISATION? PLEASE SELECT ALL THAT APPLY

| Commitment | Gold Leaf Clients | Gold Leaf Consultants | Gold Leaf Contractors | Gold Leaf Product Manufacturers | All Gold Leaf Members |
|--|-------------------|-----------------------|-----------------------|---------------------------------|-----------------------|
| | (%) | (%) | (%) | (%) | (%) |
| Public commitment to a net gain biodiversity target | 38 | 0 | 27 | 0 | 22 |
| Public commitment to a no net loss biodiversity target | 14 | 0 | 0 | 11 | 8 |
| A nature and biodiversity strategy is in place | 48 | 44 | 36 | 44 | 44 |
| Member of the Natural Capital Coalition | 0 | 11 | 9 | 22 | 8 |
| None of the above | 38 | 44 | 45 | 33 | 40 |

QUESTION 2:
IS THE PRESSURE INCREASING ON THE PROPERTY AND CONSTRUCTION SECTOR TO RESTORE NATURE AND PROMOTE BIODIVERSITY? PLEASE SELECT ALL THAT APPLY

| Answer | Gold Leaf Clients | Gold Leaf Consultants | Gold Leaf Contractors | Gold Leaf Product Manufacturers | All Gold Leaf Members |
|---------------------------------------|-------------------|-----------------------|-----------------------|---------------------------------|-----------------------|
| | (%) | (%) | (%) | (%) | (%) |
| Yes, due to customers | 38 | 67 | 91 | 44 | 56 |
| Yes, due to national/local government | 48 | 44 | 36 | 22 | 40 |
| Yes, due to investors | 14 | 44 | 18 | 33 | 24 |
| No | 14 | 0 | 9 | 22 | 12 |
| Do not know | 0 | 11 | 0 | 33 | 8 |

QUESTION 3:

WHAT HAS PREVENTED YOUR ORGANISATION FROM GOING FURTHER, BOTH IN TERMS OF ASPIRATION AND ACHIEVEMENT?

| Barrier | Gold Leaf Clients | Gold Leaf Consultants | Gold Leaf Contractors | Gold Leaf Product Manufacturers | All Gold Leaf Members |
|--|-------------------|-----------------------|-----------------------|---------------------------------|-----------------------|
| | (%) | (%) | (%) | (%) | (%) |
| Lack of financial methodology | 29 | 11 | 27 | 33 | 26 |
| Lack of local and national government policy | 14 | 11 | 9 | 22 | 14 |
| Lack of clients demanding | 0 | 33 | 18 | 22 | 14 |
| Trade-offs with other sustainable designs | 10 | 0 | 27 | 0 | 10 |
| Internal skills shortage | 5 | 11 | 0 | 33 | 10 |
| Lack of space onsite | 10 | 0 | 9 | 11 | 8 |
| Lack of best practice | 10 | 0 | 0 | 0 | 4 |
| No strategic plans | 5 | 0 | 9 | 0 | 4 |
| Lack of industry knowledge | 5 | 0 | 0 | 11 | 4 |
| Location | 5 | 0 | 9 | 0 | 4 |
| Lack of peer action | 5 | 0 | 0 | 11 | 4 |
| Don't own buildings | 0 | 22 | 0 | 0 | 4 |
| Not a leadership priority | 0 | 0 | 0 | 22 | 4 |
| Lack of shareholder demand | 0 | 0 | 9 | 11 | 4 |
| No clear definition | 5 | 0 | 0 | 0 | 2 |
| Trade off with quality | 5 | 0 | 0 | 0 | 2 |
| Lack of government guidance | 5 | 0 | 0 | 0 | 2 |
| Inflexible planning requirements | 5 | 0 | 0 | 0 | 2 |
| Lack of government metric | 0 | 0 | 9 | 0 | 2 |
| Lack of partnerships with NGOs | 0 | 0 | 9 | 0 | 2 |
| No business value | 0 | 0 | 0 | 11 | 2 |
| Lack of technology | 0 | 0 | 0 | 11 | 2 |
| Coordination | 0 | 0 | 0 | 11 | 2 |

QUESTION 4:

WHICH NGOS, GOVERNMENT BODIES, AND INDUSTRY GROUPS DOES YOUR ORGANISATION WORK WITH REGARDING NATURE AND BIODIVERSITY?

| Partner | Gold Leaf Clients | Gold Leaf Consultants | Gold Leaf Contractors | Gold Leaf Product Manufacturers | All Gold Leaf Members |
|---|-------------------|-----------------------|-----------------------|---------------------------------|-----------------------|
| | (%) | (%) | (%) | (%) | (%) |
| Aldersgate Group | 0 | 0 | 9 | 0 | 2 |
| Bat Conservation Trust | 0 | 0 | 0 | 11 | 2 |
| Birdlife International | 0 | 0 | 0 | 11 | 2 |
| Buglife | 0 | 0 | 0 | 11 | 2 |
| Bumble Bee Conservation Trust | 5 | 0 | 0 | 11 | 4 |
| Butterfly Conservation | 0 | 0 | 0 | 11 | 2 |
| Cambridge Institute for Sustainability Leadership | 10 | 0 | 0 | 0 | 4 |
| Chartered Institute of Ecology and Environmental Management (CIEEM) | 5 | 0 | 9 | 0 | 4 |
| City of Trees | 5 | 0 | 9 | 0 | 4 |
| Construction Industry Research and Information Association (CIRIA) | 14 | 0 | 73 | 0 | 22 |
| Department for Environment, Food & Rural Affairs (Defra) | 10 | 0 | 9 | 0 | 6 |
| Freshwater Habitats Trust | 0 | 0 | 0 | 11 | 2 |
| GLA | 14 | 0 | 0 | 0 | 6 |
| Greater Manchester Wetlands Partnership | 5 | 0 | 0 | 0 | 2 |
| Grown in Britain | 0 | 0 | 9 | 0 | 2 |
| Hertfordshire Wildlife Site Partnership | 0 | 11 | 0 | 0 | 2 |
| Highways England | 0 | 0 | 9 | 0 | 2 |
| Innovate UK | 5 | 0 | 0 | 0 | 2 |
| Institute of Environmental Management and Assessment (IEMA) | 5 | 0 | 9 | 0 | 4 |
| Kew Gardens | 0 | 0 | 9 | 0 | 2 |
| London Borough Tower Hamlets | 5 | 0 | 0 | 0 | 2 |
| Manchester City Council | 0 | 0 | 9 | 0 | 2 |
| Mersey Forest | 5 | 0 | 0 | 0 | 2 |
| Ministry of Housing | 5 | 0 | 0 | 0 | 2 |
| National Park City | 5 | 0 | 0 | 0 | 2 |
| Natural England | 19 | 0 | 18 | 11 | 14 |
| Natural Resources Wales | 0 | 0 | 9 | 22 | 6 |
| Nature after Minerals | 0 | 0 | 0 | 11 | 2 |
| Royal Society for the Protection of Birds (RSPB) | 10 | 0 | 9 | 11 | 8 |
| Scottish Environment Protection Agency | 0 | 0 | 9 | 0 | 2 |
| The Environment Agency | 5 | 0 | 0 | 11 | 4 |
| UKGBC | 5 | 11 | 18 | 0 | 8 |
| University of Birmingham | 0 | 0 | 9 | 0 | 2 |
| Wild West End | 5 | 0 | 0 | 0 | 2 |
| Wildlife Trust | 38 | 22 | 36 | 33 | 34 |
| World Business Council for Sustainable Development | 0 | 0 | 9 | 0 | 2 |
| World Wildlife Fund | 0 | 0 | 9 | 11 | 4 |

QUESTION 5:

WHAT COULD UKGBC DO TO SUPPORT MEMBER ORGANISATIONS TO PROTECT NATURE AND ENHANCE BIODIVERSITY?

| UKGBC Action | Gold Leaf Clients | Gold Leaf Consultants | Gold Leaf Contractors | Gold Leaf Product Manufacturers | All Gold Leaf Members |
|----------------------------------|-------------------|-----------------------|-----------------------|---------------------------------|-----------------------|
| | (%) | (%) | (%) | (%) | (%) |
| Best practice examples | 38 | 11 | 45 | 44 | 36 |
| Industry collaboration | 14 | 22 | 45 | 22 | 24 |
| Guidance and training | 29 | 22 | 27 | 11 | 24 |
| Workshops | 23 | 11 | 27 | 0 | 18 |
| Lessons learnt sessions | 19 | 0 | 18 | 33 | 18 |
| List of quick and long-term wins | 10 | 22 | 27 | 22 | 18 |
| Lobby government | 10 | 22 | 27 | 0 | 14 |
| Business case | 5 | 33 | 18 | 11 | 14 |
| Working groups | 19 | 0 | 27 | 0 | 14 |
| Create or sign post to metrics | 10 | 11 | 18 | 11 | 12 |
| Webinars | 14 | 0 | 18 | 0 | 10 |
| Audits/certification | 5 | 0 | 9 | 22 | 8 |
| Actor Map | 10 | 0 | 9 | 0 | 6 |

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