THE SUSTAINABILITY CERTIFICATION BAROMETER

2018 Edition

A STUDY CARRIED OUT BY GREEN SOLUCE
The Green Soluce team is pleased to present the 2018 Edition of the Sustainability Certification Barometer™.

This fifth edition is fully in line with the previous editions, especially the 2017 one, as we have pursued our European scope of quantitative analysis tackling 21 European countries and offering a triple urban focus on France, the UK and Germany.

However, the 2018 edition goes beyond just updating last year’s data. We have improved our graphs, making them even more insightful with regards to the key trends in sustainable real estate. Plus, we have included new certification topics, which are growing in the European real estate ecosystem and which complement sustainability certifications: wellbeing and digital. Opening up the Barometer to other types of certifications mirrors Green Soluce’s vision: tomorrow real estate and cities will need to be agile. What does this mean? Following a holistic and systemic approach, projects in the built environment will need to provide a successful answer to the sustainability challenge (environmental and societal), to wellbeing expectations, as well as take into account the digital transformation in real estate in order to always better serve the occupant, who we must not forget is also a citizen belonging to a local community.

Last but not least, the 2018 edition offers a brand-new perspective with regards to value: In partnership with HBS Research, our team strove to approach the sustainable value of certified buildings by defining and applying a new methodology, which crosses our data on certified buildings with the transaction data provided by HBS. This first approach allows us to translate the concept of « sustainable value » or « green value », into euros, and to stress the hypothesis that: « Yes, sustainability applied to real estate creates business value! »

A big thank you to my team at Green Soluce and we hope you enjoy the study!

Ella Etienne | CEO, Green Soluce

HBS Research is pleased to support the 2018 Edition of the Sustainability Certification Barometer™ by Green Soluce.

This pioneering quantitative study on sustainability, wellbeing and digital certifications allows the real estate industry to better comprehend market dynamics at a European scale.

The approach carried out by Green Soluce perfectly matches the corporate DNA of HBS Research, which has always worked towards increased transparency of market data.

In that respect, providing the market values stemming from our database has helped Green Soluce to define a methodology of the sustainable value of certified buildings : a big step forward for the real estate ecosystem!

Thank you to Green Soluce for another enriched edition of the Barometer and enjoy reading the study.

Blaise HEURTEUX | CEO, HBS RESEARCH
What is our mission? We are an innovation consulting firm dedicated to enabling the rise of more sustainable, smarter and user-centric real estate and cities, which we call « agile ». These are great places we love to work in, live and play.

More than just a team of consultants, Green Soluce brings together passionate sustainability facilitators and accelerators dedicated to helping private and public organisations design, implement and communicate on projects, which aim to bring about the agile real estate and cities of tomorrow. Our team are experienced and multilingual professionals, trained at leading engineering, architecture, business and political science institutions.

Our team is constantly on the look-out for the new key underlying trends of the real estate sector. Green Soluce’s know-how is both global and strategic, as well as technical and specific. We analyse each project in its specific context and we put forward our triple expertise to differentiate and make your project bring full satisfaction to all stakeholders through strategy and innovation, engineering and communications.

Green Soluce is committed to initiating pioneering projects, which help the real estate and urban industry embrace best sustainable practices by involving partners and co-constructing approaches in a collaborative mode. Green Soluce is a dynamic contributor to innovation in the sustainability field of real estate and cities in Europe. Thanks to our leadership, we maintain and develop an ecosystem of public and private partners at the heart of tomorrow’s urban design.

Here are three examples of such initiatives:

- Since 2014, Green Soluce has published every year the Sustainability Certification Barometer™. This study is currently the first and only quantitative study to offer reliable figures on the status of the main sustainability, wellbeing and digital certifications across Europe. It has become a reference for the sustainable real estate and urban community, and an annual appointment of the sustainability trade media.

- In 2015, on the road to COP21, Green Soluce designed and moderated a conference at the French Parliament on sustainable finance, which was officially labelled as a "COP21 initiative of the civil society" by the French government.

- In 2018, Green Soluce initiated and co-designed an innovative academic seminar in partnership with ESSEC Business School and the support of the Ecole des Ponts ParisTech and ENSA-V, the Architecture University in Versailles. It is the first multidisciplinary, prospective seminar applying the agile method to answer strategic questions of major real estate companies.

Furthermore, Green Soluce is the French Ambassador for "One Planet Living". This framework, which is recognised and endorsed as a best-in-class approach by WWF and the United Nations, comprises ten easy-to-grasp principles and the related operational applications. Together, they provide a practical roadmap to create a sustainability action plan to implement the "One Planet Living" strategy. Green Soluce is deeply involved in this process in France and internationally. Ella Etienne, our CEO, is certified as an international integrator of the "One Planet Living" framework.

www.greensoluce.com
The SERCIB Group, founded in 1986 by Dominique Lebel, is a French-based real estate developer. SERCIB develops office building projects across France, with a particular focus on the Île-de-France region for upscale developments, as well as residential projects in the French South-Eastern regions (PACA region). SERCIB Group remains to this day a family-owned human-sized business.

The office buildings built by SERCIB France are either “speculative” projects (there is no tenant identified from the outset) or “built-to-suit” projects, i.e. specifically tailored to match a future tenant’s specifications.

Since its creation, SERCIB has always aimed to put health and well-being for users of office buildings at the core of its developments. Very early on, SERCIB took into account aspects, such as landscape environment, energy savings, design and construction quality. Chosen 25 years ago, the SERCIB signature: “What is true will remain” has never been more relevant than under the current spotlight of sustainability.

Mindful of its ecological footprint, the SERCIB Group is involved and receptive to its duty as a corporate citizen, such as the pressing need “to return to our children the earth which we borrowed from them”. SERCIB supports the 10 principles of the U.N. Global Compact and is an active contributor of the “green value” working committee of the “Plan Bâtiment Durable” framework led by the French government. SERCIB also participates in the Sustainable Development Commission of the MEDEF.

www.sercib.com
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PRESENTATION OF THE CERTIFICATIONS

1 | Sustainability Certification systems

The HQE™ certification

The HQE™ certification (High Environmental Quality) will appeal to building owners, public bodies, users, real estate developers and investors, as well as planners and local authorities. HQE™ is an evaluation and certification tool which gives evidence of a successful commitment to achieving a building or territory in line with sustainability. This approach can be applied all around the world, whatever the local regulatory, cultural or climatic context may be. HQE™ has been developed for residential, commercial, administrative or tertiary buildings, in every business field, whether they are under construction, in refurbishment or already in operation, as well as urban planning operations and infrastructure assets.

The project team sets its own objectives in the specific context of the operation and makes its own choices for architectural and technical solutions.

The certification process guides professionals all along their project, from the design stage to post construction. They are encouraged to reduce their environmental impact, their water, energy and waste consumption of the building, and to improve the health, the comfort and the wellbeing of the users. This approach leans on an evaluation system based on a scientific method that uses key indicators showing the environmental performance of the building.

An independent third-party auditor is involved at the different project milestones to provide evidence for the achievement of the sustainability objectives.

www.certivea.fr
www.beHQE.com

The BREEAM® certification

BREEAM® is the world’s leading sustainability assessment method for master planning, infrastructure and buildings projects. It addresses a number of lifecycle stages such as New Construction, Refurbishment and In-Use. Globally there are more than 561,200 BREEAM® certified developments, and almost 2,263,200 buildings registered for assessment since it was first launched in 1990. BREEAM® inspires developers and creators to excel, innovate and make effective use of resources. The focus on sustainable value and efficiency makes BREEAM® certified developments attractive property investments and generates sustainable environments that enhance the wellbeing of the people who live and work in them.

www.breeam.com

The LEED® certification

Leadership in Energy and Environmental Design (LEED®) is a globally recognized symbol of excellence in green building and communities. LEED® certification ensures electricity cost savings, lower carbon emissions and healthier environments. LEED®’s global sustainability agenda is designed to achieve high performance in key areas of human and environmental health, acting on the triple bottom line - putting people, planet and profit first. LEED® credits are awarded by third party technical reviewers; are applicable to all building types throughout a building’s lifecycle; and are developed in close collaboration with diverse stakeholders from throughout the global building industry. With over 200,000 square meters of building space certifying every day, LEED® is driving international green building practices. There are nearly 90,000 projects using LEED® across 165 countries and territories worldwide and more are registering every day.

http://www.usgbc.org/leed
The DGNB® certification

There are a number of certification systems for sustainable building. The DGNB® System is unique. It provides an objective description and assessment of the sustainability of buildings and urban districts. Quality is assessed comprehensively over the entire life cycle of the building. The DGNB® Certification System can be applied internationally. Due to its flexibility, it can be tailored precisely to various uses of a building and even to meet country-specific requirements. The outstanding fulfillment of up to 50 sustainability criteria from the quality sections ecology, economy, socio-cultural aspects, technology, process workflows and site are certified. The system is based on voluntarily outperforming the concepts that are common or usual today. If a performance requirement is met, the DGNB® awards the DGNB® certificate in bronze, silver, gold and platinum. In addition, there is the option of simple pre-certification in the planning phase.

www.dgnb-system.de

The WELL™ certification

The WELL Building Standard™ (WELL™) combines best practices in design and construction with evidence-based medical and scientific research - harnessing buildings as vehicles to support human health and wellbeing. WELL™ is an independently verified, performance-based system for measuring, certifying and monitoring features of buildings that impact human health and wellbeing. WELL™ is also the first building standard to focus exclusively on the human health and wellness in our buildings and communities. WELL™ Certified™ spaces can help create buildings that improve the nutrition, fitness, mood, sleep patterns, productivity and performance of its occupants. WELL™ is composed of over 100 features that are applied to each building project. Each WELL™ feature is designed to address issues that impact the health, comfort or knowledge of occupants through design, operations and behavior.

www.wellcertified.com

The OsmoZ label

The OsmoZ label brings together a set of new and concrete solutions (evaluation, training, label, benchmarking) to improve the comfort and wellbeing of employees and the CSR performance of organisations through the construction design of buildings, interior design, but also HR services and policies. Thus, OsmoZ contributes to employee fulfilment while contributing to many societal challenges (public health and inclusion among others). The OsmoZ reference system is intended to be educational, progressive, scalable and flexible. It is structured around six axes: lifestyle – environmental health – collaborative approach – functionalities – work-life balance – communication and sense of community.

https://osmoz.certivea.fr/
The R2S label

The digital revolution is changing the way professionals work, thanks in particular to technologies such as the cloud, big data and digital mock-ups. The building sector is also strongly impacted by these developments and faces many challenges in terms of digitisation. The R2S-Ready2Services label, awarded by Certivéa and developed in partnership with the SBA - Smart Buildings Alliance for Smart Cities - and the HQE-GBC Alliance, supports projects to turn buildings into digital service platforms. By becoming connected, buildings are better integrated into the sustainable city.

http://r2s.certivea.fr

The WiredScore label

Created in 2013 in New York, WiredScore is a global label dedicated to Internet connectivity for commercial real estate. WiredScore labelling enables developers and investors to understand, improve and promote the connectivity of their assets. Internet access ranks among the top three criteria for building users, along with price and location. Until now, little information was available on building connectivity. The WiredScore label therefore allows more transparency by providing users and real estate players with all the information relating to the connectivity of their office spaces, in order to guarantee highly connected workspaces. World leader in its field and present in 150+ cities, WiredScore has evaluated the connectivity of 1400+ of the most prestigious buildings, the Empire State Building in New York, the Shard in London and the Tours Duo in Paris.

https://wiredscore.com/fr/
Objective of the 2018 Edition of the Sustainability Certification Barometer™

The 2018 Edition aims to be a decision-making tool for the real estate players of the tertiary sector. It presents a reliable and objective overview of the current market and the trends in terms of sustainability certifications for non-residential assets.

Based on the same quantitative assumptions, the Sustainability Certification Barometer™ aims to put into perspective the main sustainability, wellbeing and digital certifications across Europe. Data from 21 European countries, representing the most widely-used certifications, are processed in the study. The data have been grouped in large geographical sets, called “macro-zones”, which are listed below:

- France
- United Kingdom and Ireland
- Germany
- Benelux (Belgium, the Netherlands and Luxemburg), Austria and Switzerland
- Southern Europe: Spain, Portugal, Greece and Italy
- Northern Europe: Norway, Denmark, Sweden and Finland
- Eastern Europe: Poland, the Czech Republic, Slovakia and Hungary

The data used in the present study result from on-line available public listings, confirmed by the certification bodies.

- For HQE™: [http://www.beHQE.com](http://www.beHQE.com)
- For BREEAM®: [http://www.greenbooklive.com/search/scheme.jsp?id=202](http://www.greenbooklive.com/search/scheme.jsp?id=202)
- For LEED®: [http://www.usgbc.org/projects](http://www.usgbc.org/projects)
- For WELL™: [https://wellonline.wellcertified.com/community/projects](https://wellonline.wellcertified.com/community/projects)
- For R2S: [http://r2s.certivea.fr](http://r2s.certivea.fr)
- For WiredScore: [https://wiredscore.com/fr/](https://wiredscore.com/fr/)

The data cut-off date is December 31st, 2017.

To be comparable, the data sets required detailed sorting and checking by the Green Soluce team.