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The need for sustainable business is becoming ever more important. Organisations throughout the UK are taking notice and reflecting this in the decisions they make and the policies they put in place. The green agenda was also threaded through each of the political parties this May when they were putting forward their manifestos; the pressures driving this debate forward are increasing and that can only be a good thing for society.

Our Annual Sustainability Survey, provides a unique understanding of how FM professionals and their organisations are adapting and evolving in response to the increased focus on the sustainability agenda. In its ninth year, this survey helps to track attitudes towards sustainability, the main barriers to effective implementation and many other areas of the debate which paints a picture of what the future for this subject holds not only for our profession but the wider business community as a whole.

Worryingly this year’s survey sees a dip in the effective implementation of sustainable policies which comes at a time where there is a sharp increase in the drivers behind them and the barriers preventing performance. The pressure is building from either side and perhaps it is starting to show as organisations begin to feel the strain.

Lifting the lid on some of these challenges can help us identify potential solutions and we hope that when you read through the findings within this report it will not only resonate with some of the challenges that you are facing but that it will also help to inform and inspire your future decisions.

I would like to thank everyone that has taken part in this project, as well as our partners who have produced this report but also, all those that took the time to share their experiences and views with us.

Gareth Tancred, CEO, BIFM
@BIFM_CEO
BIFM launched its 9th annual Sustainability in Facilities Management (FM) survey between March and April 2015. Developed by the BIFM Sustainability Special Interest Group, the survey’s primary and ongoing aim is to consider the way that FM professionals are engaging with the sustainability agenda.

The survey collected input from over 300 respondents and together with data from previous years was used to track trends and progress against the key sustainability requirements.

**Figure 1** Respondents by Organisational Type

- End-user (e.g. in-house facilities management department)
- Facilities management company (e.g. outsourced providers of full FM services to client organisation)
- Consultants
- FM service provider (e.g. outsourced providers of single FM services to client organisation)
- FM product supplier (e.g. provides relevant products to FM departments)
- Other

**Figure 2** Respondents by Organisational Level

- Managing Director / CEO
- Senior Management
- Middle Management
- First Line Management
- Non-Management
- Other

**Figure 3** Respondents by Size of Organisation

- 1 – 9
- 10 – 49
- 50 – 99
- 100 – 249
- 250 – 499
- 500 – 999
- 1,000 – 4,999
- 5,000+
- 11%
Following the initial survey analysis, a workshop with a group of leading experts was held on the 12th May in London.

They represented both FM suppliers and end-users and their input was used to examine the survey findings in more detail and draw out the main themes and areas of interest. The quotes used within this report are taken from this workshop.
Chris Moriarty
Head of Insights and Corporate Affairs
BIFM

Tony O’Donnell
Managing Partner
Cambium

Sunil Shah
Director at Acclaro Advisory and CBxchange
Acclaro Advisory and CBxchange

Steve Workman
Corporate Responsibility Director
ISS

Nigel Youd
Senior IMS Manager Sustainability
Carillion
Since the launch of this project nine years ago it has reported a steady increase in importance of a number of drivers behind the sustainability agenda.

Across wider society there is a heightened awareness of what sustainability means, coupled with the ability through social technology to hold brands to account, meaning that organisations are taking a more introspective view of how they run their business to ensure that they are not the next scandal splashed across the tabloids. Protection of corporate reputation has been one of the main drivers behind the sustainability agenda in business and, along with increased legislation, has seen the subject dominated by a tick-box mentality which is undermining the true benefit that can be derived from a holistic and strategic approach to sustainability.

This year’s report confirms a sharp acceleration in these two trends as well as some others. Legislation and corporate image remain the top two drivers with the former being cited as a key driver for almost everyone that took the survey (95%) and the latter being a driver for 90% of respondents.

Encouragingly both organisational ethos and lifecycle costs have seen the largest increase when compared to 2014; the latter jumping some 25% which would point to more organisations taking a long term view of their practices and policies.

Figure 4 Sustainability Drivers 2009 – 2015
Whilst respondents noted that the drivers were increasing in importance, and therefore the pressures with them, they also noted that there has been a similar increase in the factors preventing organisations effectively managing their sustainability policies. In 2014 it was only customer and physical constraints that were highlighted by more than half of the respondents as being barriers to success. This year we see every single one of the options presented as being a barrier for at least half of those that took the survey. There were a number of categories that saw an increase of over 20% compared to last year.

**Figure 5 Barriers to Sustainability Effectiveness 2007 – 2015**
Both of these trends align with the findings of the survey from 2014, albeit with a more marked upturn in 2015. It appears that a tipping point may have been reached and the heightened pressures and drivers, together with increased barriers to success, have seen a drop in effectiveness. Respondents are reporting a 20% drop in their ability to implement and manage their environment/sustainability/CSR policy which bucks a trend that this report has seen over recent years. This drop appears to coincide with the pressures and barriers increase and may represent a need for a rethink or change of emphasis with the overall sustainability strategy.

This year’s survey reveals that the FM profession is facing a ‘Sustainability Crunch.’ Meeting the challenges of these rising pressures to deliver more effective management of sustainability will require a step change in response by the profession. It’s clear that FM, both as a community of professionals and as an industry can have a huge impact on the sustainability agenda but unless it can respond to this ‘crunch’ it is in danger of being marginalised as others step in to fill the need.

The survey responses have revealed three key areas, where FM’s can focus their efforts to begin to address this challenge;

1. **Leadership**
2. **Making the business case for sustainability**
3. **Collaboration**

This report explores each of these areas and identifies some of the areas that require attention, based on the responses from respondents and feedback from the workshop, and offers some suggestions and recommendations for improvements that can be implemented in organisations.
Sustainability is seen as an important issue at all levels in responding organisations with the greatest importance being noted by executive management (CEOs and Senior Management) with 81% seeing sustainability as being a very or extremely important issue for the business. For middle managers, front line managers (FLM) and staff the importance levels were high with over 60% seeing sustainability as being very important.

The decline in importance by management level indicates a dilution of the leadership messages as they are passed on through the business implying that there is a need to re-assess the internal alignment and priority given to sustainability goals.

There is also a variation in the importance of sustainability between in-house teams and FM service suppliers. Of those organisations that indicated that sustainability is a very or extremely important issue, suppliers hold a higher view of its importance than respondents from those in-house. The reasons for this divergence in importance are not clear from the survey results, but the workshop suggested that this is due to the growing significance of sustainability criteria in tenders for FM services compared to the operational pressures once delivery begins.

Figure 7 Level of Sustainability Importance by Organisational Level

The decline in importance by management level indicates a dilution of the leadership messages as they are passed on through the business implying that there is a need to re-assess the internal alignment and priority given to sustainability goals.

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The data indicates that suppliers who do not identify and react to these rising sustainability expectations are likely to be commercially exposed in winning or retaining contracts. Given this trend, end users may need to look beyond the claims made in procurement processes to ensure that suppliers’ pledges on sustainability are backed up by actions and are not just words.

The data also shows that a small, but significant, percentage (8%) of in-house teams are not taking sustainability seriously. Given that a number of studies show a rise in the importance of sustainable business amongst the C-suite, FM professionals in these organisations risk marginalisation if their priorities and activities aren’t aligned with the overall goals of the organisation. Those in leadership roles in the profession see sustainability as a very important aspect of their role, and whilst there is scope for improvement in some parts of the profession, this commitment does not appear to be translated into delivery given the effectiveness drop.

Responses showed a wide variation in the level of governance used to monitor progress amongst the respondent organisations. 59% of respondents confirmed that sustainability was owned by the managing director or a named senior director. This means that despite the high importance given to sustainability by all respondents, in reality 41% of organisations still do not have their sustainability policy owned at director level and that 15% of all respondents did not know who owned their organisation’s sustainability at a strategic level.

Figure 8 Level of Sustainability Importance – In-house versus FM Service Supplier

“It's quite common for particularly large organisations to be looking outwards via the CEO, pushing out whatever their policy is and actually forgetting to tell the people in-house who are managing their resources.”

Polly Plunket-Checkemian, Partner, EMEA Head of Research & Insight, Cushman and Wakefield
A review of formal versus informal sustainability objectives also revealed a gap between the stated importance of sustainability and how it is managed in practice. Here the results show that whilst formal KPIs are highest at executive management level, the split around formal versus informal is around 50% with a further 12% of all respondents having no metrics at all. This is more evidence that where formal sustainability targets are absent it is likely that other priorities (i.e. those that are measured) will get more focus and attention from senior management.

Figure 9 Ownership of Sustainability Responsibility by Organisational Level

Figure 10 Comparison of Formal Sustainability Objectives with Organisational Level
The gap between the stated importance of sustainability and how it is measured and managed in practice may point to the recent decline in effectiveness as this lack of ownership and inconsistency in governance aligns with the observed fall off in the effectiveness of sustainability management. These leadership issues need to be addressed, if FM is to avoid an accusation of only paying “lip service” to sustainability. It will also act as a barrier to the profession’s ability to meet the growing sustainability challenges.

Addressing the “Sustainability Crunch” will require ownership of sustainability implementation at an executive level, underpinned by formal measures to monitor progress.

A potential consequence of this inconsistent approach is the variation in sustainability priorities within the organisation. Comparing sustainability priorities by management level showed that the executive management saw customer expectations as having the highest importance while at the first line manager (FLM) and staff level, good resource/cost management were seen to be most important closely followed by legislative compliance.

This difference in priorities between executive management and their teams shows a need for greater alignment and communication of both rationale and priorities for sustainability programmes as well as a need for more collaboration internally which this report explores further in a later section.

Figure 11 Why Sustainability is Important by Organisational Level

When comparing priorities between in-house FM and external FM suppliers responses showed similar levels of importance for these drivers, the exception being the expectations of customers.

As this was the most important driver of sustainability for executive management, it seems in-house FM teams need to reinforce the importance of customer expectations across the organisation.

For suppliers the importance of customer demands for sustainability - at over 60% compared to 40% for all of the other drivers - was the dominant motivation for investing time and effort on sustainability. For suppliers it would appear that reinforcing the benefits of these drivers for sustainability is an opportunity to improve its effectiveness.
LEADERSHIP – RECOMMENDATIONS

1. To improve communications - owners of the FM sustainability strategy (leaders) need to ensure that executive management teams are aware of planned sustainability programmes and progress made against the programme’s goals.

2. Conduct regular executive level reviews of sustainability programmes to retain alignment with organisational priorities.

3. FM Leaders to ensure alignment of priorities with corporate sustainability goals.

4. Carry out a review of the perception of sustainability and its importance throughout the organisation for consistency and re-promote programmes, where required.

5. To ensure follow through and commitment - introduce/establish director level sponsorship of FM sustainability programmes.

6. Ensure governance aligned to and supported by formal, measurable KPIs.

7. In-house FM leaders to raise awareness /reinforce (at all levels in the business) the importance that sustainability programmes make to supporting the demands of their organisation’s clients.
The ability to understand and communicate the benefits of sustainability to the rest of the business, in particular to executive management, is crucial. Reviewing the responses from those in leadership positions it is clear that there is a need to re-connect the sustainability agenda with the priorities of the executive management of the business and to make clear its ability to “move the dial” by addressing some of the rising pressures already identified.

“I’m not sure that sustainability in its broadest sense has necessarily got to the top of the table in terms of that business case being understood, in terms of driving competitive advantage. Because, I think once the business case is understood the organisation changes its strategic response.”

Polly Plunket-Checkemian, Partner, EMEA Head of Research & Insight.

The adoption of sustainable business models requires organisations to move away from making investment decisions based solely upon narrow metrics of value, i.e. the financial or economic bottom line. Instead sustainable businesses focus on creating long term value for their key stakeholders, e.g. consumers, employees and investors, by including a consideration of environmental and social impacts in combination with the traditional economic measures; a move towards a triple bottom line (TBL) approach which is often summarised as a coordinated business strategy that ensures that the business aligns its goals with positive outcomes for People (Social), Profit (Economic) and the Planet (Environmental). Whatever the primary driver in each organisation, further commitment to the sustainability programme is only likely to happen if the leader of change in business practices, or investment needs, creates a solid business case.

“As a supplier, after the contracts are signed and you get down to the day-to-day running, the KPIs set the priorities for operations managers. This can be a weekly penalty. Unless you get that sorted out the financial penalties are enormous. So that’s what drives behaviour at the sharp end.”

Nigel Youd, Senior IMS Manager Sustainability, Carillion.

Part of this business case needs to include the projected benefits in sustainability that organisations have already flagged as important and in many instances have policies in place for. Despite this clear need, the survey showed that over a third of respondents had no formal system to collect and check the information it gathers on sustainability. The number that said they had ‘no formal reporting’ remained high (over 35%) even for the largest companies; a major barrier to gathering good quality data to build and validate the business case, or indeed measure the success of its implementation.

“You need very good data in place to push targets through the supply chain. If the data is not robust, the targets lack credibility, the performance lacks credibility.”

A spokesman at a leading UK bank.
However, the implementation of measurement systems alone will not guarantee greater effectiveness unless the measures of progress are aligned with and reflect the sustainability priorities set by the executive management of the business.

When reviewing the top five sustainability policy areas, as ranked by respondents, mapped against the percentage who have actual KPIs in place for measuring that is encouraging to see the majority saying they do, even for these top policy areas it is less than 100%.

**Figure 13 Sustainability System and Processes in Use**

**Figure 14 % Coverage of KPIs vs Sustainability Policy Areas**
Health and Safety is reported as the most significant area covered (78%), likely due to the collectively high ethical, legislative, financial and reputational risks associated with failures in this area. Waste and Recycling and Energy Management, both traditional environmental sources of sustainability value, are also significant at over 70%.

For the remaining two main policy areas (Training and Development and Carbon Footprint) there is a shortfall of 40% or more where there are no KPIs in place. In part carbon footprint measurement is driven by legislation and greater demands for transparency by investors and other stakeholders. Training and Development, which is the policy area with the least KPI coverage amongst the top ranking policy areas, represents a source of socio economic value in sustainability terms. It is also a metric that reflects an increasing recognition of the value of human capital in driving productivity improvements and is vital to the organisation’s capability to support the achievement of sustainability objectives.

These issues provide a clear opportunity for a debate on how these challenges are addressed by the profession as a whole. Meeting these challenges will be vital if FM is to engage executive management to both understand their changing ambitions for sustainability and to deliver the changes needed to enable the organisation to be more sustainable.

Interest levels in the top KPIs have been monitored during the years of this survey and it shows that waste and recycling remains the most important and widely measured KPI amongst respondents, which along with Energy Management and Health and Safety remain the top three criteria, measured by over 84% of respondents in 2015. All of these metrics are underpinned by legislative compliance provisions.

Of these only energy management did not drop in importance between 2014 and 2015, probably due to the ongoing implementation of the Energy Saving Opportunities Scheme (ESOS).

Taking a closer look at some of the barriers to implementing successful sustainability policies the growth in the lack of training, knowledge and barriers provides strong evidence of where respondents have seen the biggest rise in obstacles to sustainability in the past twelve months. (See figure 16)
At the same time that obstacles have been rising, the following pressures for greater sustainability commitment have been increasing, especially in 2015. External pressures from company stakeholders, such as clients, employees, investors and Government (expressed via new legislative compliance) are rising meaning that FM teams have to demonstrate clear sustainability progress.

At this inflexion point it is timely to consider the best metrics to monitor progress in relation to these rising barriers and to identify what training and skills to invest in to meet these challenges. These drivers of sustainability will not remain static, new pressures and opportunities are already on the horizon, and can be expected to impact FM. These fresh challenges will include adaptation to climate change, as well as the integration of new technologies, such as the sensor networks, the Internet of Things and big data. These factors have the potential to radically change FM business models and to offer major new innovation opportunities.

In making the assessment of new measurements of sustainability progress, the Triple Bottom Line model offers a valuable framework for FM leaders to assess the impact of sustainability on their organisation’s ability to capture new sources of economic, environmental and societal value.

FM’s ability to identify and then deliver the returns on any sustainable business case is also dependent on the knowledge and skills available. FMs need to be able to understand and then act to support the achievement of sustainability policy and objectives. The 2015 survey reviewed the status of this key enabler of sustainability.

The survey findings indicate that whilst there are high levels of confidence in respondent’s sustainability knowledge at all levels within the organisation, the depth of this knowledge is not consistent and could impact on the professions ability to meet the sustainability ambitions of the business. Whilst over 70% of CEOs and senior management possess a high degree of confidence in their sustainability knowledge at lower levels of the organisations this confidence level drops, exemplified by only 50% claiming they are confident that they have the knowledge they need on sustainability.
Comparison of sustainability knowledge between in-house teams and external FM service suppliers reveals a much higher degree of confidence amongst the latter.

This variation indicates that closer collaborations between suppliers and in-house FM could help accelerate the transfer of sustainability knowledge and accelerate the achievement of objectives in those organisations, where expertise may be limited.
MAKING BUSINESS CASE FOR SUSTAINABILITY – RECOMMENDATIONS

1. Consider organisational sustainability goals in relation to all types of sustainability value economic, environmental and societal

2. Review business cases to estimate the tangible returns on investment for projects across all these sources of value in order to improve identification of priority sustainability projects

3. The Sustainability Crunch requires FM to review its current measures for tracking progress on sustainability. In approaching this challenge, organisations should consider those metrics of progress that maximise the economic, societal and environmental benefits available to the business

4. Assess utility of current measurement process, systems and KPIs to ensure alignment with current and growing sustainability priorities

5. Review sustainability knowledge levels across the organisation

6. Investigate expertise available in supply chain ecosystems
Against the backdrop of this Sustainability Crunch, collaboration is one area where there is both an appetite for engagement and clear calls to action. The survey shows that both the in-house FM functions and external FM suppliers are looking to improve collaboration. In both cases there is a call for cross-functional collaboration, as well as an appetite to accelerate innovation through new collaborations with external parties.

Regarding innovation, in-house FMs have a greater internal focus. For the FM suppliers, their desire in collaborating with their clients is for earlier and greater input on business investment decisions in areas such as total cost of ownership.

Overall there is a need to create a working environment that encourages collaboration internally as well as externally.

Looking more closely at the in-house results there are clear differences in collaboration priorities for sustainability depending on the role. Respondents at CEO/MD levels are looking externally for greater input, whereas from senior managers through to non-managers the need for collaboration is seen mainly as an internal matter.
This difference indicates that the CEOs/MDs see a greater need for specialists and external help to meet their sustainability challenges. In contrast the rest of the organisation seem more aware of the potential gains (e.g. improved resource use) through collaboration and have more confidence in their own ability to address the organisation’s sustainability challenges. This may be linked to the point made around expertise where service providers were much more confident in their sustainability knowledge.

Irrespective of the reasons, the two figures 19 & 20 make a compelling case for greater levels of collaboration.

Despite the need and appetite for improved collaboration, there are clearly challenges in delivering a stronger collaborative and innovative environment in FM. A key point raised in the workshop highlighted that FM was lagging behind other sectors from a collaboration perspective.

“Having come from the telecoms area, six years ago, I was surprised by many of the cross industry collaboration I had taken for granted were not yet in place in FM.”

Steve Workman, Corporate Responsibility Director, ISS.
Perhaps due to the cost-focused business functions and the highly competitive environment, there appear to be significant barriers to more openness and innovation in the sector. For the in-house FM, the often short-term cost focus inevitably drives an inward looking approach that works against the potentially bigger gains from cross-functional collaboration. Again, from the workshop discussions, one example referenced was where a procurement team buying polystyrene cups had a selection criterion of the lowest price point without taking into account that disposal of the cups was six times that of their acquisition cost and that FM was paying for the increased lifecycle costs. A similar narrow focus from a sustainability perspective can drive procurement decisions and the construction of contracts that leave suppliers with little room or incentive to work towards delivering greater and more sustainable value or innovation.

The challenge of fostering more innovation is made more difficult by the fact that it is not easy to measure progress along the way or even to determine if you are heading in the right direction. This once more reflects ‘part of what gets measured gets managed’ mantra (see leadership section page 13) and in this instance is likely to lead individuals and teams to giving less of their attention and time to innovation priorities.

Effective collaboration requires investment, at least in time, if not eventually in direct financial terms. Either way it is a business decision that will be weighed against other options and priorities so anyone advocating for change in business practices or investment needs to create a compelling and solid business case. As covered in the previous section, this will rely on good quality data that can identify and track the projected benefits in the areas of sustainability that organisations have marked as important. It also highlighted the number of organisations without formal data gathering and reporting processes so as well as being a barrier to investment this lack of reliable data is also inhibiting progress on collaboration.

Given the systemic nature of these challenges (cost-focused/highly competitive sector and lack of reporting processes) there is a call for the leadership to take the first steps and many if not all the actions called for in the leadership section will help in removing barriers in this area.

Consistent with the findings in the leadership section, the survey indicates that almost half of respondents don’t rate their internal communications as good or excellent.

**Figure 21 Quality of Internal Communications**

![Quality of Internal Communications](image)
Looking at this by management level, this dissatisfaction with communications is broadly similar across all groups with the most dissatisfaction being expressed by middle and first line managers (FLM). Although the results call for improvement throughout an organisation, this could indicate a good starting point for a communications review and would potentially lead to greater opportunities for collaboration.

**Figure 22 Variation in quality of Communications versus Level in the Organisation**

![Graph showing variation in quality of communications versus level in the organisation.](image)

**COLLABORATION – RECOMMENDATIONS**

1. Review data collecting and reporting systems and assess how the system(s) could be better used to help knowledge sharing and collaboration
2. Communicate and educate on what information they contain and how this can be used
3. Identify and introduce KPIs that foster collaborative and innovative environments
4. Review KPIs that drive short-term wins in one area at the expense of greater overall business benefits
5. Identify a prioritised list of sustainability challenges that can be addressed through improved collaboration internally and externally
6. Create and champion internal collaboration forums to identify, validate and capture sustainability related business benefits
7. Engage suppliers to explore and develop solutions for the organisation’s sustainability challenges
8. Review the communications channels on sustainability with initial focus on middle and first line management
CONCLUSION

THIS YEAR’S SURVEY PROVIDES BOTH ENCOURAGING SIGNS BUT ALSO CAUSE FOR CONCERN.

Whilst it should be celebrated that the momentum behind the sustainability agenda is gathering pace, the equal acceleration in the barriers preventing performance mean that there needs to be a change in approach from FM teams at various levels and either side of the in-house/service provider coin.

The three areas explored in this report are by no means the complete answers to this challenge but they will go a long way to helping teams respond to the pressures identified. The need to continually update knowledge and learn from best practice threads throughout the report but there are some fundamental changes needed if that best practice has any chance of becoming common practice within organisations.

These changes must occur at every level of the organisation, be supported by robust data and driven by greater innovation derived from collaboration with all parties. If these areas can be improved and embedded then organisations have a real opportunity to benefit from the positive impact that a holistic and deep-rooted sustainable business model can have on performance.
ACCLARO ADVISORY

Acclaro Advisory is a specialist consultancy providing organisations with a range of carbon management and sustainable business solutions. We work with multinational corporations, governments and NGOs and have supported the BIFM Sustainability Survey since its inception.

Values

With a deep understanding of the FM sector and its placement in the wider property sector, we develop long term relationships to help navigate the best route through the increasing regulatory and commercial pressures affecting the sector.

Experience

With an established track record of delivering projects, we have an unrivalled understanding of emerging policy trends, and can offer the technical experience to help clients implement practical and measurable solutions.

Our projects include providing tailored training in-house to a large Managing Agent’s teams of over 150 individuals, supporting on ESOS compliance and wider post occupancy energy reviews.

www.acclaro-advisory.com

CAMBIUM

Cambium specialise in helping organisations realise the full business benefit of Sustainability. Cambium’s focus is on accelerating the adoption of sustainable innovations and better collaboration to make the most of the transition to more sustainable business models.

Cambium’s support services extend to the following aspects of the Sustainability agenda that are relevant to all parts of the FM value chain.

Sustainability Solution Providers:

• Analysis and insight into Sustainability markets
• Sustainability education for sales and marketing personnel
• Sales and marketing planning for Sustainability related innovations including leverage of both direct and indirect channels

End User Services

• Sustainability attitude and sentiment surveys
• Sustainability opportunity prioritisation and validation of business cases
• Sustainability leadership training and enablement

Sustainable Collaborations between Buyers and Suppliers

• Accelerated development of new partnering and collaboration models between buyers and suppliers to enable greater sustainability
• Sustainability innovation Network creation and on-going management

www.cambiumllp.com/bifm
About BIFM
The British Institute of Facilities Management (BIFM) is the professional body for facilities management (FM). Founded in 1993, we promote excellence in facilities management for the benefit of practitioners, the economy and society. Supporting and representing over 16,000 members around the world, both individual FM professionals and organisations, and thousands more through qualifications and training.

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