



INVESTMENT READINESS FOR A RESILIENT FUTURE

In November 2025, the UK Business Council for Sustainable Development (UKBCSD), together with Cushman & Wakefield, convened a senior roundtable to examine how the UK can become genuinely investment-ready for a resilient built environment.

The session took place at a decisive moment. Markets are shifting rapidly: resilience, energy security, circularity, and operational performance are no longer optional environmental considerations; they are becoming the foundations of asset value, investor confidence, and long-term economic competitiveness.

“ Sustainability is no longer a compliance exercise and a cost burden; it is a strategic lever for market advantage. ”

The UK’s current system is not aligned to capture this opportunity. Compliance-led behaviour limits ambition. Policy signals are fragmented and often contradictory. Net Zero is frequently framed as a constraint rather than a platform for innovation.

Capital markets are increasingly ready to invest in high-performing assets, but the financial system struggles to price resilience, quantify risk, or reward long-term value. Insurance, lending, planning, and valuation move at different speeds, and investor confidence weakens when signals are inconsistent.

Participants emphasised that collaboration between public and private sectors must deepen, and the narrative and actions must shift decisively toward value creation.

The insights from this roundtable provide the investment and value spine of the UK Sustainable Industrial Plan (SIP) to be published during 2026 as a national framework for system-led growth, resilience, and competitiveness.

OUR PREVIOUS 2025 ROUNDTABLE SUMMARIES ARE AVAILABLE HERE:



Climate-Resilient
Risk Management
In Infrastructure
Development.



Strategy to Delivery:
Making the UK’s
Industrial Ambitions
Investable.



Building Resilience:
Making the UK’s
Built Environment
Climate-Ready.

POLICY, SIGNALS & SYSTEM LEADERSHIP:

From Minimum Compliance to Investment-Ready, Innovation-Ready Policy



CHALLENGE: Policy inconsistency, conflicting signals, and minimum-standard regulation are constraining innovation and deterring investment. Organisations face more than 40 different definitions of Net Zero across government and regulators. Compliance frameworks reward the lowest acceptable threshold rather than long-term value creation. Participants noted that regulation alone cannot deliver the scale of change required, both regulation and incentives are needed.



SOLUTION: A clear, long-term, system-led policy foundation that provides certainty for investors, insurers, local authorities, and developers. Policy should enable ambition rather than restrict it, embedding resilience, circularity, and operational performance as core economic objectives.



ACTION: Establish a **National Policy Framework** for Investment-Ready Resilience, aligning planning, regulation, and local authority powers with long-term national investment and resilience goals.

CAPITAL, INVESTMENT & INSURANCE ALIGNMENT:

Recognising Resilience as a Financial Asset



CHALLENGE: Green lending is advancing, but investment and insurance markets are not yet aligned. Sustainability and resilience are priced inconsistently, and valuation methodologies do not fully account for operational performance, embodied carbon, or whole-life risk. Local authorities plan through Local Plans, infrastructure strategies, and long-term spatial frameworks spanning 20–30 years, while capital markets typically operate on five-year cycles. This structural mismatch between long-term place-making and short-term investment horizons continues to undermine the viability of resilience-led development.



SOLUTION: A unified approach aligning lenders, investors, valuers, and insurers around the financial value of resilience including reduced operational risk, improved productivity, lower lifecycle costs, and enhanced asset competitiveness.



ACTION: Create a **Unified Investment–Insurance–Valuation Standard for Resilience** to embed performance, climate risk, and long-term value consistently across the financial system.

DATA, EVIDENCE & METRICS:

Creating the Green Thread of Trusted Information



CHALLENGE: The current data landscape is fragmented, inconsistent, and difficult for investors to rely on. EPCs provide only a partial indication of real-world performance and do not offer the operational or resilience insights needed for investment decisions. Flood risk and climate exposure are already prompting investor withdrawal from certain locations. Investors also highlighted the gap between design intent and operational reality, raising concerns about whether assets perform as designed.



SOLUTION: A national evidence base that integrates asset-level and place-level data: operational performance, energy and water use, climate adaptation needs, embodied carbon, infrastructure capacity, and delivery risk. A ‘green thread’ of information should follow each asset through design, delivery, occupation, and transition.



ACTION: Establish a **National Resilience & Energy Data Standard** as the UK’s authoritative dataset for planning, valuation, underwriting, and investment decisions.

VALUE, VIABILITY & TRANSITION PATHWAYS

Defining Long-Term Value Beyond Short-Term Cycles



CHALLENGE: Value is defined inconsistently across sectors. Short-term investment cycles clash with long-term place-making. Retrofit-first approaches struggle within existing appraisal models. Social value and social benefit are often conflated or monetised in ways that dilute impact. Participants emphasised that clarity on definitions and appraisal methods is essential to unlocking long-term resilience investment.



SOLUTION: A whole-life valuation approach that embeds long-term productivity, health outcomes, social benefit, operational performance, and embodied carbon. Sector-specific transition pathways for commercial real estate, residential development, infrastructure, and local authority-led schemes should be introduced to guide consistent decision-making.



ACTION: Introduce **Whole-Life Value Transition Pathways** that incorporate resilience, retrofit benefits, embodied carbon, and community outcomes into investment and appraisal processes.

INNOVATION & SYSTEM DELIVERY:

Delivering System Innovation Beyond Compliance Constraints



CHALLENGE: Innovation is constrained by compliance frameworks, siloed responsibilities, and slow technology adoption. Proven solutions such as microgrids, heat networks, circular energy and water systems, and data-centre heat reuse are not being deployed at pace. It was suggested that new settlements should be designed off-grid by default to build long-term resilience and energy independence. Others questioned whether GB Energy, in its current form, is positioned to support this shift.



SOLUTION: A whole-systems approach that enables place-based energy infrastructure, decentralised power, and circular resource flows. Proven international solutions should be adopted and adapted quickly.



ACTION: Create a **System Innovation Licensing Pathway** to accelerate the deployment of proven resilience and energy technologies across both new and existing places.

SKILLS, LEADERSHIP & PARTNERSHIPS:

Building the Capability to Deliver an Investment-Ready UK



CHALLENGE: Skills shortages in energy systems, digital resilience, circularity, and data analysis limit delivery. Public and private sector leadership capacity is uneven. Participants noted a persistent 'deficit mentality' around climate and Net Zero, which constrains ambition and narrative clarity. Public-private partnerships remain inconsistent and need stronger structures.



SOLUTION: A national uplift in leadership and technical capability that embeds systems thinking, accelerates innovation, and positions sustainability as a source of competitive advantage. Strengthen public-private partnerships as engines of local delivery.



ACTION: Launch a **National Leadership & Skills Programme for Resilient Investment**, supported by partnership frameworks enabling local authorities, investors, and industry to deliver resilience at scale.

OUR ADVISORY STATEMENT TO GOVERNMENT

To unlock investment-ready resilience and strengthen national competitiveness, Government should:

01.

Establish a National Policy Framework for Investment-Ready Resilience by providing coherent, long-term signals for planning, regulation, and development.

02.

Create a National Resilience & Energy Data Standard by delivering a trusted evidence base for planning, valuation, insurance, and investment.

03.

Align capital markets around resilience performance through a unified investment-insurance-valuation standard.

04.

Embed whole-life value and long-term viability across sectors by including retrofit-first strategies, transition pathways, and social benefit frameworks.

05.

Build national leadership and skills capacity by embedding systems thinking and delivery capability across public and private sectors.

These actions will form a core component of the Sustainable Industrial Plan (SIP) to be published in early 2026 the UK's framework for system-led growth, resilience, and investment readiness.

CLOSING REFLECTIONS

Investment readiness is now the decisive factor in determining whether the UK's built environment can become resilient, competitive, and future-fit.

Aligning policy, capital, data, leadership, and delivery capability is essential if the UK is to embed long-term value and convert resilience from a regulatory obligation into a strategic economic strength. By placing investment readiness at the centre of national policy and market design, the UK can turn sustainability into a genuine competitive advantage.

These actions will form a core component of the Sustainable Industrial Plan to be published in early 2026, positioning the UK to lead in creating resilient, investable places for communities and the wider economy.

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