Course : Sustainable Real Estate: ESG and Sustainable Finance Applied to Real Estate

Understanding and Assessing Risks and Integrating ESG into Every Stage of a Real Estate Transaction

Practical course - 1d - 7h00 - Ref. IEM

Price : 980 CHF E.T.

NEW

Driven by a combination of regulatory requirements (RE2020, the Tertiary Sector Decree, the European Taxonomy, CSRD, etc.) and the expectations of investors and lenders regarding non-financial performance, ESG has become a direct factor in the value—or discount—of real estate assets, which you will explore during this training.

Teaching objectives

At the end of the training, the participant will be able to:

- Placing ESG issues in the current real estate context and measuring their impact on asset value
- Understand the key regulatory changes and their implementation timeline through 2026 (RE2020, Tertiary Sector Decree, BACS Decree, Taxonomy, CSRD and Omnibus Package, ZAN)
- Identify and prioritize ESG risks (physical, transition, financial, and reputational) and the associated value creation opportunities
- Map ESG action levers at each phase of a project (planning, design, implementation, and operation)
- Assess the suitability of an ESG strategy applied to an asset or portfolio using practical tools
- Develop a structured ESG case to convince a lender or investor

Intended audience

Developers, investors, real estate companies, family offices; asset managers; program managers and coordinators; engineering firms and project management consultants; lenders and real estate credit analysts; CSR/ESG managers.

Prerequisites

None

Course schedule

PARTICIPANTS

Developers, investors, real estate companies, family offices; asset managers; program managers and coordinators; engineering firms and project management consultants; lenders and real estate credit analysts; CSR/ESG managers.

PREREQUISITES

None

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.
Participants also complete a placement test before and after the course to measure the skills they've developed.

1 Understanding the Context of Sustainable Real Estate

Compétences visées

- Understanding the Ecological and Real Estate Transition: Key Figures, Climate Challenges, and the Sector's Share of Emissions
- Understanding Sustainable Finance and Sustainable Real Estate: What Are We Talking About? Concepts, Stakeholders, and the Value Chain
- Provide an overview of regulatory requirements and their timelines
- Understanding the Impact of Greenwashing: Reputational, Regulatory, and Financial Risks

Activités pédagogiques

- Group Discussions on the Impact of the Green Transition on the Real Estate Sector

2 Mapping ESG Stakeholders, Risks, and Opportunities

Compétences visées

- Understand the different asset classes (residential, commercial, logistics, retail) and the ESG factors specific to each
- Analyze stakeholders: developers, investors, local governments, lenders, users, and insurers
- Mapping ESG Risks: Physical, Transition, and Financial Risks
- Identifying Opportunities: Green Value, Preferential Financing, Rental Appeal, Portfolio Resilience

Activités pédagogiques

- ESG mapping of a transaction by sub-groups—identification of risks and opportunities.

TEACHING AIDS AND TECHNICAL RESOURCES

• The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.

• At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.

• A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

3 Integrating ESG throughout the real estate transaction

Compétences visées

- Examine the preliminary phase: efficient land use, ZAN, environmental planning, and selection of certification standards from the design stage onward.
- Monitoring the construction phase: bio-based materials, clean construction sites, life cycle assessment (LCA), reuse, and the circular economy
- Taking Charge of the Operations Phase: Energy Efficiency and the Tertiary Sector Decree, Environmental Management, and Long-Term Green Value.
- Addressing Social and Governance Issues: A Methodology for Assessing Non-Financial Risks, with Examples

Activités pédagogiques

- Work on an ESG analysis framework applied to a transaction—strengths, areas of concern, and opportunities for improvement.

4 Understanding the Relationship Between Sustainable Finance and Real Estate

Compétences visées

- Understanding what banks and investors expect from a sustainable real estate project in 2026.
- Understanding Green Financing Tools: Green Loans and Green Bonds—An Overview and Eligibility Requirements
- Understanding Funders' Requirements: SRI Labels, Taxonomy Criteria, and SFDR Obligations (Articles 8 and 9)
- Understanding the Impact of the European Omnibus Package on Reporting Practices

Activités pédagogiques

- Mini-workshop: Developing an ESG case for a financier.

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Dates and locations

REMOTE CLASS
2027 : 5 Mar., 11 June, 3 Sep., 26 Nov.