

# **Challenges for Surveying Professionals in the 21st Century - Ethics and the Importance of Stakeholder Engagement.**

**Nigel Sellars, England**

**Key words:** ethics, trust, confidentiality, transparency, stakeholder engagement

## **SUMMARY**

In a world where there are an increasing number of negative headlines about the alleged poor ethical conduct and competence of professionals: What does it mean to be a surveyor in the 21st century? How is the surveying industry viewed by industry stakeholders? What are seen to be the key risks for unprofessional conduct by surveyors? What does this mean for the reputation of surveyors and the future of the profession? What impact does robust stakeholder engagement have on the ability of surveyors to operate, along with the quality and adoption of standards?

Ethical conduct and competence cuts across the surveying profession regardless of geography or specialism. If surveyors are not seen to be acting appropriately and/or to the appropriate technical competence, the integrity of the profession and those in it are at stake. However, in a globalised marketplace, what constitutes suitable ethical conduct / technical competence and when should a professional step aside from an instruction? How do surveyors hope to understand what is deemed ethical by their peers and clients, whilst remaining relevant especially in this fast moving digital age without appropriate stakeholder engagement?

A thoroughly thought through and executed stakeholder engagement plan, leads to robust professional standards, which facilitate public confidence in those they employ not to mention surveying related professionals and firms to be competitive in their marketplaces. Without public confidence and engagement in the professionalism of those providing surveying services, the long-term value of surveyors and those acting within this industry will be jeopardised. Paying lip service to engagement, by contrast can have negative impacts.

The object of the exercise is to give confidence to the users of surveying related services, especially regarding concerns over perceived and actual ethical and / or competence breaches. Without a standardised, high level approach – the chances of public confidence being undermined are high, which ultimately places the future of the profession at risk. A systematic, not scattergun approach to stakeholder engagement promotes long term success and benefits all industry stakeholders. A working group has formed to undertake extensive market research, to answer the question – ‘what does it mean to be a surveyor in the 21st century?’- noting ethics and stakeholder engagement as key objectives. This presentation will highlight some of the issues involved, the engagement process and the status of the initiative.

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## **1. BACKGROUND**

1.1 Ethical behaviour is normally associated with ‘doing the right thing’. For surveyors this involves much more than following their own conscience. Being ethical also brings expectations on demonstrating professional competency in the role being performed, representing clients to the best of their ability and also acting to uphold the public interest.

1.2 Extensive research was undertaken by RICS throughout 2018 on the subject of ethics in surveying and stakeholder engagement, undertaking a series of surveys and roundtable discussions with students, trainees, through to senior practitioners and general public, across the globe.

1.3 In the past, professionals served clients but changes in societal expectations have meant that professionals need to serve the public interest as well. It is the responsibility of all practitioners to promote the usefulness of the profession for the advantage of the public and across the world. The modern professional is potentially dealing with a myriad of issues including diversity, inclusion, sustainability and ethical behaviour.

1.4 The global surveying profession has an important role to play in ensuring that organisations of all sizes adhere to the highest ethical and governance standards.

1.5 This increased focus on ethics, corporate governance and corporate responsibility has resulted in organisations considering drafting their own code of conduct. In some countries, laws and regulations have required such codes; in others their establishment has been prompted by market forces and / or regulation. From a wider economic point of view, implementing an agreed and robust ethics code effectively and consistently could improve organisational performance and control and lead to a build up of trust between companies and their stakeholders.

1.6 An absence of or indeed an ineffective response to ethical dilemmas can tarnish an organisations reputation impacting on financial performance. Facilitating good ethical behaviour in organisations can help both to safeguard reputation and to convey a commitment to responsible practice to the general public and to relevant regulators.

1.7 Inappropriate business practices and even individual incidents of improper conduct reflect to some degree the values, attitudes, beliefs and systems of the organisation in which they occur. This could result in aspersions being cast on management for failing to provide

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leadership if they do not implement and enforce robust systems and controls to encourage and facilitate appropriate standards of conduct and behaviour.

## **2. THE RESEARCH**

2.1 The questions below were answered by not only surveying professionals, but from the clients and public they serve, on what professionalism means to them. Quantitative and qualitative research was undertaken to understand what is meant by professionalism and professionals, and the standards they should work towards with a focus on market risk.

### 2.2 Questions

What does 'professionalism' mean to you?

What is the current state of professionalism in real estate? Have you noticed any significant changes over the past 20 years and what have been the drivers?

How does professionalism need to evolve in the future?

What are the major risks you see to the professional status of real estate practitioners and what should regulators do about it?

## **3. FEEDBACK**

3.1 Ethical behaviour was found to be a core attribute for all surveyors. The 2018 research undertaken found the overwhelming majority of global practitioners were of the view that strong ethical principles and behaviour will become even more important in the evolving digital age. This view was echoed by a similar proportion of senior management respondents, referring to the surveyors in their organisations.

3.2 Furthermore, the majority of responding surveyors agree that ethical behaviour helps to build trust in the digital age. And almost all the executives who responded, thought that the surveyor's ethical behaviour helps the organisation build trust with internal and external stakeholders. The fundamental principles for surveyors, established by the International Ethics Standards Coalition (<https://ies-coalition.org/>) still apply and remain relevant in the digital age.

3.3 Leaders at senior executive level, placed a slightly higher level of importance on ethics than the average across all respondents. This bodes well for promoting ethics in an organization, as its success or otherwise depends crucially on tone at the top. The behaviour of leaders sets the standard for how the organisation prioritises and displays ethical behaviour.

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3.4 Also, the proportion of respondents citing ethics as ‘very important’ rises slightly as one moves from students in training to fully established surveyors. This may suggest that the training, both conceptual learning and applying it in a work environment, is helping to reinforce the importance of ethics.

3.5 Embedding ethical standards in day-to-day procedures was also raised, and was chosen by most respondents.

3.6 Another commonly cited factor, by just over half of respondents, was for support in creating, implementing and managing a code of ethics for the organisation (including organisational values). Rated next in importance were training support and establishing evaluation procedures to assess whether behaviour aligns with fundamental ethical principles.

## **4. IMPACT OF EVOLVING TECHNOLOGY ON ETHICS**

4.1 Recent years have seen advances in technology that are impacting the built environment and the role of professionals everywhere. The increasing reliance on data and technology for communication and making key business decisions has sparked intense ethical debate.

4.2 As part of the wider ethics research, a roundtable was held with leading industry thinkers in order to facilitate discussion around the ethical implications of technology in the built environment and to better understand the need for new skills and standards in an ever-changing landscape.

4.3 A selection of the questions posed to the participants included:

1. What role does regulation play when introducing new technology into the sector? How far should we stifle innovation with regulatory barriers?
2. What checks and balances are important for technology? What is the role of standards in a tech-driven market?
3. How will job roles change? What will the role of a professional be in future?

4.4 Key lessons learned:

4.5 It is clear that the real estate market is being and will continue to be impacted by innovation and technology can bring great opportunities. However, there are also some ethical challenges around the introduction of new technology into the industry which highlights the increasing importance of standards and the need for new skills within the profession. To behave ethically and instil trust in a digital age, surveyors will need to learn new information relatively quickly, and to apply their judgement to this information, often in situations they may not have seen before.

4.6 A thoroughly thought through and executed stakeholder engagement plan, leads to robust professional standards, which facilitate public confidence in those they employ not to mention surveying related professionals and firms to be competitive in their marketplaces. Without public confidence and engagement in the professionalism of those providing surveying services, the long-term value of surveyors and those acting within this industry will be jeopardised. Paying lip service to engagement, by contrast can have negative impacts.

4.7 As Martin Luther King, Jr. said “The time is always right to do what is right”

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## **BIOGRAPHICAL NOTES**

As part of the Professional Groups and Forums team at RICS, Nigel sits on a number of commercial property-related panels whose function is to shape industry best practice, raise standards and develop policy. He also has joint responsibility for (and input into) the guidance notes, journals, articles and forums produced and managed by these groups.

Nigel comes from a valuation background, having previously worked at Deloitte LLP. He has experience in valuation for secured lending, risk management and governance. Nigel has experience in the financial modelling of institutional investment in the residential sector and development/estate regeneration advice.

He is keen to drive standards within the industry and raise the profile of the RICS with the membership.

Nigel has been previously involved with the RICS in a number of different guises; as a former RICS Matrics UK Chair (2013-2014), the Matrics global representative on RICS International Governing Council (2013-2014) and the Matrics representative on the RICS Nominations Committee (2011-2013).

## **CONTACTS**

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