England and Wales

Building Surveyor Services

2018 edition
Contents

Additional notes ........................................................................................................ 1

1 Construction ........................................................................................................ 1
   1.1 General ............................................................................................................ 1
   1.2 Preparation ..................................................................................................... 1
   1.3 Tendering and procurement ............................................................................ 2
   1.4 Enabling works ............................................................................................... 2
   1.5 Health and safety ............................................................................................ 2
   1.6 Appointing the Professional Team ................................................................. 3
   1.7 Executing the Project ..................................................................................... 3
   1.8 Contractual services ........................................................................................ 4
   1.9 Technical services .......................................................................................... 4
   1.10 Supplementary services ................................................................................ 5

2 Building and measured surveys .......................................................................... 5
   2.1 General ............................................................................................................ 5
   2.2 Health and safety ............................................................................................. 5
   2.3 Building surveys and building defects .......................................................... 5
   2.4 Measured surveys .......................................................................................... 5

3 Asset management ............................................................................................... 6
   3.1 General ............................................................................................................ 6
   3.2 Health and safety ............................................................................................. 6
   3.3 Programmed maintenance ............................................................................. 6

4 Insurance .............................................................................................................. 6
   4.1 General ............................................................................................................ 6
   4.2 Insurance claims ............................................................................................. 7
   4.3 Insurance assessments .................................................................................... 7
   4.4 Supplementary services ................................................................................ 7

5 Miscellaneous ...................................................................................................... 7
   5.1 Grants .............................................................................................................. 7
   5.2 Approved inspector services .......................................................................... 7

6 Bespoke Additional Services .............................................................................. 8

Appendix: Schedule of meetings to be attended by the Consultant ................. 9
Building Surveyor Services

For use with the RICS Standard, RICS Short Form and/or RICS Short Form of Consultant’s Appointment for Designated Services

Additional notes:

- These Services should be completed by inserting a ‘tick’ in the box next to the Service to be provided. These Services can be used for the Standard/Short or Designated Form, but care should be taken in the selection of the correct form for the relevant Service. For further information, refer to the explanatory notes for the relevant RICS Form of Consultant’s Appointment.
- All other Services that are not ticked shall be deemed to be Additional Services under the terms of this Appointment.
- Any bespoke Additional Services agreed between the Client and the Consultant should be inserted in Section 6.
- A schedule of ‘typical’ meetings is included with these Services in the Appendix. Completion of this schedule is also recommended.
- Fire Risk Assessments (FRAs) should not be undertaken unless a suitable recognised qualification is held. This is a specialist technical area of work and falls outside the scope of a building surveyor’s core competencies, therefore specialist training in FRAs is required prior to undertaking this type of work.

1 Construction

Use with the RICS Standard or Short Form of Consultant’s Appointment.

1.1 General

1.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.

1.1.2 Issue instructions, on behalf of the Client, to the Professional Team and Contractor in accordance with the terms of their appointments/the Building Contract.

1.1.3 Agree Project reporting and recording procedures with the Client, the Professional Team and the Contractor. Implement agreed procedures.

1.1.4 Monitor the performance of the Professional Team and the Contractor. Report to the Client.

1.1.5 Prepare regular/monthly design, quality, cost and programme reports. Advise the Client of any decisions required and obtain authorisation.

1.2 Preparation

1.2.1 Liaise with the Client and the Professional Team to determine the Client’s initial requirements and to develop the Client’s Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.

1.2.2 Liaise with the Professional Team and advise the Client on structural, building, measured and other surveys and Site investigations including condition reports, soil reports, etc.

1.2.3 Prepare a measured survey/condition survey or other report on the Site or any existing buildings on the Site. Produce dimensioned drawings, schedule of condition and other record documents.

1.2.4 Visit the Site and carry out initial inspections. Advise the Client on areas of concern.

1.2.5 Carry out a desktop study of archive material. Prepare a report and advise the Client.

1.2.6 Liaise with the Professional Team and advise the Client on statutory or other approvals required and fees due in respect of the Project. Recommend payments to the Client.

1.2.7 Advise on the cost of the Project. Advise on the cost of alternative design and construction options.

1.2.8 Advise on the Programme for the design and construction of the Project.

1.2.9 Visit the Site and/or the Project and review record drawings and/or other information provided by the Client. Prepare a written feasibility report for the Client on the adequacy of the information supplied.

1.2.10 Prepare an initial appraisal for the Project, including advice and recommendations on the technical feasibility of the works required, their approximate costs, their design and construction programme and any statutory or other approvals required.

1.2.11 Liaise with the Professional Team and prepare outline proposal(s) for the Project, including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client’s approval.

1.2.12 Liaise with the Professional Team and prepare detailed design proposal(s) for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client’s approval.

1.2.13 Liaise with the Professional Team and establish a structure and procedure for design and quality management. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.
1.3.8 Attend pre- and post-tender interviews.

1.3.9 Advise on tendering and contractual procurement options. Prepare recommendations for the Client’s approval.

1.3.10 Advise on suitable tenderers for the Building Contract. Prepare recommendations for the Client’s approval.

1.3.11 Liaise with the Professional Team and advise on errors, omissions, exclusions, qualifications and inconsistencies between the tender documents and the tenders received. Prepare recommendations for the Client’s approval.

1.3.12 Advise on the tenderers’ design and construction programmes and method statements.

1.3.13 Liaise with the Professional Team and prepare, or obtain from the Professional Team, cost and design studies to assess alternative contractors’ proposals. Prepare recommendations for the Client’s approval.

1.3.14 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums. Prepare recommendations for the Client’s approval.

1.3.15 Provide services for a 2-stage tendering process.

1.4 Enabling works

1.4.1 Advise the Client on specialist Services, including consultants, contractors, subcontractors and suppliers required in connection with the Project.

1.4.2 Advise the Client on demolition, strip-out, Site investigation and enabling works contracts required before the Building Contract.

1.4.3 Liaise with the Professional Team and procure demolition, strip-out, Site investigation and enabling works contracts required prior to commencement of the Building Contract.

1.4.4 Manage, on behalf of the Client, demolition, strip-out, Site investigation and enabling works as they proceed.

1.5 Health and safety

1.5.1 Liaise with the Professional Team and advise the Client of its obligations under the Construction (Design and Management) Regulations 2015 (CDM Regulations).

1.5.2 Comply with the CDM Regulations insofar as they relate to this Appointment.
1.6 Appointing the Professional Team

- 1.6.1 Advise the Client on the selection, the terms of appointment and fee structures for the Professional Team. Conduct negotiations with, and prepare and complete the forms of appointment for, the Professional Team.

- 1.6.2 Advise the Client on the Professional Team’s professional indemnity insurance cover. Annually confirm cover remains in place.

- 1.6.3 Advise the Client on the need for staff resident at the Site.

1.7 Executing the Project

- 1.7.1 Administer the terms of the Building Contract and advise on additional works required by third parties.

- 1.7.2 Liaise with the Professional Team and prepare a scheme design, or similar, report for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required.

- 1.7.3 Prepare and maintain a Project execution plan, or similar management tool, identifying the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist subcontractors/suppliers.

- 1.7.4 Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.

- 1.7.5 Liaise with the Professional Team and prepare and maintain a project design strategy identifying the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist subcontractors/suppliers. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.

- 1.7.6 Liaise with the Professional Team and prepare a pre-construction report for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required.

- 1.7.7 Liaise with the Client and the Professional Team and advise on methods of progressing design and/or construction works prior to the execution of the Building Contract.

- 1.7.8 Obtain confirmation that required insurances are in place prior to commencement of works on the Site.

- 1.7.9 Prepare, or obtain from the Client and the Professional Team, contract drawings and specifications. Liaise with the Client’s legal advisers, prepare the contract documents and deliver to the Client and the Contractor for completion.
1.8 Contractual services

1.8.1 Provide specialist building surveying advice on the interpretation of Building Contracts and the practical impact of terms and conditions.

1.8.2 Liaise with the Client’s legal advisers and advise on the use and/or amendment of bespoke forms of contract or contribute to the drafting of particular client requirements.

1.8.3 Advise on the Contractor’s entitlement to extensions of time. Analyse and report on the Contractor’s application(s) for extensions of time. Prepare recommendations for the Client’s approval.

1.8.4 Advise on the cost, contractual and programme consequences arising from an acceleration instruction.

1.8.5 Advise on the Contractor’s entitlement to loss and expense. Analyse and report on the Contractor’s loss and expense claim(s). Prepare recommendations for the Client’s approval.

1.8.6 Prepare documentation and/or provide advice to support adjudication proceedings. Attend adjudication proceedings.

1.8.7 Prepare documentation and/or provide advice to support mediation proceedings. Attend mediation proceedings.

1.8.8 Prepare documentation and/or provide advice to support arbitration and/or litigation proceedings. Attend arbitration and/or litigation proceedings.

1.9 Technical services

1.9.1 Prepare a maintenance manual for the Project.

1.9.2 Prepare records or as-built drawings for the Project.

1.9.3 Provide records of specialist details through drawings, photography and other documentation.

1.9.4 Provide on-site supervision for the Building Contract.

1.9.5 Provide quality management services for the Building Contract.

1.9.6 Liaise with the Client and Professional Team and prepare outline and detailed design proposal(s) for the interior design and/or fit out of the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client’s approval.

1.9.7 Carry out exceptional negotiations with planning, building control and other statutory authorities.

1.9.8 Construct, or obtain, marketing and other specialist models and presentation materials.
1.10 Supplementary services

- 1.10.1 Provide services for the Client’s/third party’s organisational move to new premises.
- 1.10.2 Provide services for the Client’s/third party’s fitting-out or direct works contracts.
- 1.10.3 Provide estimates of replacement costs for insurance purposes.
- 1.10.4 Provide services in connection with insurance claims.
- 1.10.5 Facilitate, set-up and manage an electronic document management system.
- 1.10.6 Facilitate, set-up and manage early warning and risk reduction meetings.
- 1.10.7 Facilitate, set-up and manage ‘lessons learned’ or other workshops.
- 1.10.8 Provide services for partnering and/or collaborative working contracts.
- 1.10.9 Act as the Client’s partnering adviser.
- 1.10.10 Provide specialist procedural advice to comply with EU Regulations and/or other statutory legislation.

2.1 General

- 2.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- 2.1.2 Liaise with the Client and the Professional Team to determine the Client’s initial requirements and to develop the Client’s Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.
- 2.1.3 Advise the Client on specialist Services, including consultants, conservators, contractors, subcontractors and suppliers required in connection with the Project.

2.2 Health and safety

- 2.2.1 Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.
- 2.2.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

2.3 Building surveys and building defects management

**Note:** The building will be inspected from ground level or by using accessible means of entry. The roof will be accessed if safe to do so. No opening up of concealed parts will be undertaken.

- 2.3.1 Inspect the Site and/or the Project, arrange for specialist investigations and tests as may be agreed with the Client, and prepare a written report for the Client.
- 2.3.2 Prepare a written report for the Client describing the existing condition of the Site and/or the Project and identifying any particular features that may affect the Client’s future interest in the Site and/or the Project.
- 2.3.3 Inspect and investigate specific problems on the Site and/or the Project, arrange for specialist investigations and tests as may be agreed with the Client, and prepare a written report for the Client.
- 2.3.4 Carry out further investigations and tests as may be required. Monitor investigation and test results and prepare a written report for the Client.
- 2.3.5 Assess the cause of any defects and prepare a written report for the Client with recommendations for rectification work.
- 2.3.6 Advise on the employment of consultants or contractors to carry out rectification work. Inspect rectification work on behalf of the Client. On completion of rectification work prepare a written report for the Client.

2.4 Measured surveys

- 2.4.1 Carry out, or obtain, a measured survey of the Site and/or the Project and prepare survey drawings and other documents to include as required:
  - floor plans;
  - sections;
  - elevations;
  - site layout
  - levels;
  - services and drainage;
  - trees and other features; and
  - land topography.
- 2.4.2 Undertake fire audits and surveys. Prepare recommendations for the Client’s approval.
- 2.4.3 Undertake asbestos inspections and surveys. Prepare recommendations for the Client’s approval.
3.3.3 Inspect the Client’s property portfolio, or sample of the Client’s property portfolio, to determine the current condition and extent of repair and maintenance required.

3.3.4 Prepare a programmed maintenance plan compatible with the data recording systems agreed with the Client.

3.3.5 Advise on the life expectancy of building components and/or elements.

3.3.6 Implement and manage the programmed maintenance plan on behalf of the Client.

3.3.7 Advise on the employment of consultants or contractors to carry out maintenance work. Inspect maintenance work on behalf of the Client. On completion of maintenance work prepare a written report for the Client.

3.3.8 Undertake condition surveys. Prepare an assessment of the existing condition with recommendations in respect of future maintenance (See also RICS Technical Due Diligence Services).

3.3.9 Prepare recommendations in respect of planned maintenance.

3.3.10 Advise on the life expectancy of building components and/or elements and prepare a written report for the Client.

3.3.11 Advise on the life cycle costs of building components and/or elements and prepare a written report for the Client.

3.4.4 Carry out specialist investigations using alternative means of temporary access – scaffolding, ladders, craneage, etc. Prepare a written report for the Client.

3.4.5 Carry out, or obtain, specialist investigations into contaminants. Undertake specialist testing and prepare a written report for the Client.

3.4.6 Carry out, or obtain, specialist investigations into mechanical and electrical, drainage or other building services. Undertake specialist testing and prepare a written report for the Client.

3.4.7 Prepare energy performance certificates.

3.5  Inspect the Client’s property portfolio, or sample of the Client’s property portfolio, to determine the current condition and extent of repair and maintenance required.

3.6 Prepare a programmed maintenance plan compatible with the data recording systems agreed with the Client.

3.7 Advise on the life expectancy of building components and/or elements.

3.8 Implement and manage the programmed maintenance plan on behalf of the Client.

3.9 Advise on the employment of consultants or contractors to carry out maintenance work. Inspect maintenance work on behalf of the Client. On completion of maintenance work prepare a written report for the Client.

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3.11 Prepare recommendations in respect of planned maintenance.

3.12 Advise on the life expectancy of building components and/or elements and prepare a written report for the Client.

3.13 Advise on the life cycle costs of building components and/or elements and prepare a written report for the Client.

3.14 Prepare regular/monthly reports. Advise the Client of any decisions required and obtain authorisation.

3.2  Health and safety

3.2.1 Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.

3.2.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

3.3 Programmed maintenance

3.3.1 Prepare, and agree with the Client, a survey and/or sampling strategy for managing the Client’s property portfolio.

3.3.2 Review the Client’s existing reporting and maintenance systems including, where appropriate, computerised records. Liaise with the Client’s computer consultants. Prepare recommendations and a written report for the Client.

3.3.3 Inspect the Client’s property portfolio, or sample of the Client’s property portfolio, to determine the current condition and extent of repair and maintenance required.

3.3.4 Prepare a programmed maintenance plan compatible with the data recording systems agreed with the Client.

3.3.5 Advise on the life expectancy of building components and/or elements.

3.3.6 Implement and manage the programmed maintenance plan on behalf of the Client.

3.3.7 Advise on the employment of consultants or contractors to carry out maintenance work. Inspect maintenance work on behalf of the Client. On completion of maintenance work prepare a written report for the Client.

3.3.8 Undertake condition surveys. Prepare an assessment of the existing condition with recommendations in respect of future maintenance (See also RICS Technical Due Diligence Services).

3.3.9 Prepare recommendations in respect of planned maintenance.

3.3.10 Advise on the life expectancy of building components and/or elements and prepare a written report for the Client.

3.3.11 Advise on the life cycle costs of building components and/or elements and prepare a written report for the Client.

4.1 General

4.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.

4.1.2 Liaise with the Client and the Professional Team to determine the Client’s initial requirements and to develop the Client’s Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client’s approval.

Note: Insurance assessments and insurance claims support provided under this Agreement are not regulated activities as defined in the Financial Services and Markets Act 2000. Should investment advice be required the Client will be advised to discuss their investment requirements with Financial Services Authority (FSA) authorised specialists.
4.1.3 Advise the Client on specialist Services, including Consultants, conservators, Contractors, subcontractors and Suppliers required in connection with the Project.

4.1.4 Prepare regular/monthly reports. Advise the Client of any decisions required and obtain authorisation.

4.2 Insurance claims

4.2.1 Notify the Loss Adjuster and/or other interested parties of the Consultant's Appointment.

4.2.2 Check the policy details and advise the Client on the extent of cover in place.

4.2.3 Inspect the Site and/or the Project and record the extent of damage. Identify the need for any temporary works and/or emergency repairs. Prepare a written report for the Client.

4.2.4 Prepare documentation to support the claim.

4.2.5 Advise on statutory and other consents required.

4.2.6 Prepare estimates of the costs of repairs. Prepare recommendations for the Client's approval.

4.2.7 Prepare, submit, administer and negotiate insurance claims.

4.3 Insurance assessments

4.3.1 Review the proposed policy details and advise the Client on the appropriate level of cover required.

4.3.2 Review existing policy details and advise the Client on the level of cover in place.

4.3.3 Visit the Site and/or the Project, take measurements as appropriate and review record drawings or other information provided by the Client. Prepare a written report for the Client on the adequacy of the information supplied.

4.4 Supplementary services

4.4.1 Replacement cost calculations in accordance with the RICS Reinstatement Cost Assessment Services.

5 Miscellaneous

Use with the RICS Short Form of Consultant's Appointment for Designated Services.

5.1 Grants

5.1.1 Advise the Client on the types of grant that can be obtained from central or local government or other body for development, alterations or repair of the Site and/or the Project.

5.1.2 Liaise with the Client and the Professional Team, prepare and/or obtain supporting documentation to support grant applications. Prepare and submit grant applications and conduct negotiations on behalf of the Client.

5.1.3 Monitor actual expenditure against forecasts included in grant applications. Submit claims for payment. Prepare a written report for the Client.

5.2 Approved inspector services

5.2.1 Examine feasibility and/or outline proposals, report on their likelihood of compliance with the Building Regulations and/or other statutory regulations.

5.2.2 Examine plans and report on compliance with the Building Regulations and/or other statutory regulations.

5.2.3 Conduct consultations with statutory authorities, the Professional Team and the Contractor.

5.2.4 Certify compliance of design with the Building Regulations and/or other statutory regulations.

5.2.5 Submit initial notices and plan certificates as appropriate.

5.2.6 Inspect the Site and/or the Project and report on compliance with the Building Regulations and/or other statutory regulations. Conduct consultations with statutory authorities, the Professional Team and the Contractor. Certify compliance with the Building Regulations at completion and prepare a final certificate.

6 Bespoke Additional Services

6.1 Enter or attach bespoke Additional Services agreed with the Client.
Appendix: Schedule of meetings to be attended by the Consultant

### 1 Client meetings

<table>
<thead>
<tr>
<th>Attendance:</th>
<th>Partner</th>
<th>Director</th>
<th>Associate</th>
<th>Project surveyor</th>
<th>Other (please specify)</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Frequency:</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>No attendance required</th>
<th>Other</th>
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Please specify requirements: ______________________________________

### 2 Design team meetings

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<th>Associate</th>
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<th>Frequency:</th>
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<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
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Please specify requirements: ______________________________________

### 3 Project team meetings

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<th>Associate</th>
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<th>Frequency:</th>
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<th>Quarterly</th>
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<th>Other</th>
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### 4 Site meetings

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<td>Other</td>
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Please specify requirements: _________________________________________________________________

### 5 (Other) meetings

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<th>Partner</th>
<th>Director</th>
<th>Associate</th>
<th>Project surveyor</th>
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<th>(Specify required attendees)</th>
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<th>Frequency</th>
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<td>Other</td>
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</tbody>
</table>

Please specify requirements: _________________________________________________________________
Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the valuation, development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to markets and effecting positive change in the built and natural environments.

Americas

**Latin America**
ricsamericalatina@rics.org

**North America**
ricsamericas@rics.org

Asia Pacific

**ASEAN**
ricsasean@rics.org

**Greater China (Shanghai)**
ricschina@rics.org

**Greater China (Hong Kong)**
ricshk@rics.org

**Japan**
ricsjapan@rics.org

**Oceania**
oceania@rics.org

**South Asia**
ricsindia@rics.org

EMEA

**Africa**
ricsafrica@rics.org

**Europe**
ricseurope@rics.org

**Ireland**
ricsireland@rics.org

**Middle East**
ricsmiddleeast@rics.org

**United Kingdom RICS HQ**
contactrics@rics.org