
**Sustainable cities and communities —
Recommendations and requirements
for project developers — Meeting ISO
37101 framework principles**

*Villes et communautés territoriales durables — Recommandations et
exigences pour les développeurs de projets — Répondre aux principes
du cadre ISO 37101*

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 268, *Sustainable cities and communities*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

This document is intended for project developers carrying out urban building and construction projects within the holistic sustainability management framework of sustainable development in communities (the subject of ISO 37101), where a local government either has implemented the standard or has not implemented the standard but intends to do so. It also gives guidelines to decision-makers and managers responsible for authorising, promoting, financing, planning, designing, procuring, managing, reviewing, and implementing a project or programme.

For details on key terms and concepts of sustainable cities see the Bibliography at the end of this document, in particular “The ABC for Sustainable Cities”, Reference [20] and “Rethink cities” Reference [19].

This document:

- supports a top-down approach where a specific project or programme is required to meet a community’s ISO 37101 management system requirements and both a community and a developer need to be guided in the way in which the project or programme would be expected to meet the requirements;
- supports a bottom-up approach where a community does or does not have a formal ISO 37101 framework in place and developers can face several types of situations, for example:
 - where a community has adopted the ISO 37101 management system framework with accompanying procedures which place requirements on urban project stakeholders;
 - where a community has not adopted ISO 37101, but intends to align projects with the standard’s holistic approach for ensuring that action in different areas contributes to the purposes of sustainable development;
 - where a community does not have an authority charged with implementing an ISO 37101 framework, but nonetheless, projects initiated and planned by private, public or mixed entities aim for alignment with ISO 37101 principles and procedures without formal reference to an ISO 37101 management system.

The context, within which the ISO 37101 approach is implemented, is as follows:

- Sustainable development is considered as an international consensus formalized in the Sustainable Development Goals (SDGs);
- Engagement at the community level is a major issue for the sustainable development of society since issues such as climate change, biodiversity, job creation, and health are often more effective and relevant at the local level;
- Local authorities face a wide and complex variety of related issues (economic, social, cultural, financial and environmental), and sustainability needs a holistic approach;
- A relevant and effective sustainability strategy for communities needs to imply a wide diversity of interested parties and these interested parties expect accountability for the issues arising and the actions undertaken;
- A wide set of standards already exists, at the local, national or international level, that responds to regulations and to voluntary undertakings such as certifications and ratings prescribed by project owners;
- Integrating sustainable development in community strategies and management systems is a real management challenge; it needs leadership and a strong management system framework;
- Sustainability strategy requires a long-term and a life cycle approach and needs to be assessed using a “total cost” approach which takes into account, in the long term, both positive and negative impacts; monitoring systems need to be designed in that context.

To help implement the management system standard, this document is consistent with the various management methods and tools, including strategy analysis; gap analysis; materiality assessment; capacity projection; stakeholder management; change management; maturity analysis; performance monitoring; reporting.

These tools are compatible with ISO quality management systems (QMSs) for quality or environmental management (e.g. ISO 9001 and ISO 14001) and the Plan-Do-Check-Act (PDCA) cycle based on ISO 9001.

The structure of this document is shown in [Table 1](#).

Table 1 — ISO 37109 (this document) structure

Document structure		Integration of sustainability in community principles in the Project Management stages and processes throughout the project life cycle		
Scope	Clause in this document	Initiating and planning	Implementation and follow-up	Monitoring controlling closing
A. General	1 . Scope	A summary of each main generic tool functionality is presented in the clauses of the main document, while a detailed overview is detailed in A.4 or Annex B. NOTE: This document covers the stages of the project until its closing stage, which includes the transfer of its deliverables to future stakeholders.		
	2 . Normative references			
	3 . Terms and definitions			
B. Context	4 . Context of the organization			
	5 . Leadership			
C. Implementation	6 . Planning			
	7 . Support			
	8 . Operations			
D. Operation	9 . Performance and evaluation			
	10 . Improvement			

Tools described in this document:

- Mapping of the territory actors: [Clause 4](#) and details in [Annex B](#);
- Relevance analysis of a project (relevance analysis, updated relevance analysis, performance assessment): [Clause 4](#) and details in [B.2](#); for an example of relevance analysis methodology, see Reference [22] in the Bibliography.
- Method to align a project: [Clause 6](#) and details in [B.3](#);
- Project governance and management (e.g. project management, resource management, ensuring changing situations, commissioning): [Clause 7](#) and details in [A.4](#);
- Transfer of the project: [Clause 8](#) and details in [B.4](#).

Each type of tool is presented according the following headings:

a) Tool description

- Purpose?
- Nature?
- What is the benefit?
- Who can take advantage of the tool?

b) Tool action (the process for using the tool):

- What are the inputs?
- What are the outputs, deliverables, and output use?
- What is the process for using the tools?
- At what point in the project cycle can the tool be applied?
- What capabilities are needed to implement the tool?

This document is consistent with the World Bank "Urban Sustainability Framework" (USF). See Reference [24] and [A.2](#).

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Sustainable cities and communities — Recommendations and requirements for project developers — Meeting ISO 37101 framework principles

1 Scope

This document provides recommendations and requirements to project developers, decision-makers and managers responsible for authorising, promoting, financing, planning, designing, procuring, managing, reviewing and implementing a project or programme. The recommendations and requirements aim to ensure that a project or programme adds value by aligning its development and implementation with a community's own or externally directed sustainability strategies and objectives and the requirements of ISO 37101.

This document supports both a top-down approach, where the community has implemented ISO 37101 and expects the developers to meet the standard's requirements, as well as a bottom-up approach, where the developer wants to meet the ISO 37101 framework principles whether the community has or has not implemented the standard. In both situations, it is recognised that implementing this document ensures that the project will contribute holistically to the sustainability of the community.

This document:

- recognises that there are several types of communities and stakeholder organisations that are charged with implementing ISO 37101;
- offers practical guidelines to all types of developers on initiating, planning, implementing, monitoring, managing and continually improving sustainable development activities for a specific project or programme at all its stages in a way that is both inclusive and holistic and in accordance with ISO 37101;
- in referencing the six sustainable development goals (SDGs) of ISO 37101, establishes a framework for the evaluation of the relevance of a project or programme in the context of the sustainable development of a community, the community's strategy and objectives, its management capacity, and its management systems for quality, the environment, health and safety, and governance;
- supports mainstreaming the actions and interactions of a multitude of independent decision makers to enhance the global impact on sustainable urban development that results from a wide variety of urban strategies, plans and programmes.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 37101:2016, *Sustainable development in communities — Management system for sustainable development — Requirements with guidance for use*

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>

— IEC Electropedia: available at <https://www.electropedia.org/>

3.1
contractor

professional in charge of providing the deliverables of a project

3.2
design

stage where the client's and/or the end users' ambitions, requirements, and applicable regulatory requirements are transformed into the specification for building the asset, to be agreed before its construction

Note 1 to entry: The design includes the following sub stages described in CSN 16310:

- Conceptual design;
- Preliminary design;
- Developed design;
- Technical design

Note 2 to entry: Sub-stages can also include "As Built design".

[SOURCE: CSN EN 16310]

3.3
designer

professional in charge of a built asset's design

Note 1 to entry: Examples of designers are architects, engineers, town planners.

3.4
inception

origin of a project from its starting condition

3.5
management principles

fundamental beliefs, norms, rules and values that can be accepted as true, and which can be used for management

Note 1 to entry: In this document, sustainability management and *project management* (3.9) principles refer to ISO 37101 principles.

3.6
programme

functional requirements which define the purposes to be achieved

3.7
project

temporary endeavour to achieve one or more defined objectives

Note 1 to entry: In this document, "project" is specific to "urban and rural space, and ground planning projects" which encompasses all urban components, e.g. buildings, infrastructure (bridges or networks, public transport systems, open public space, urban services). Achievement of the project objectives requires the provision of deliverables conforming to specific requirements.

[SOURCE: ISO 21502:2020, 3.20, modified — Note 1 to entry added.]

3.8**project developer**

person, group of persons or organisations, whatever their statute, private, publicly owned or mixed entity, developing urban projects and all, or part of, related activities, e.g. designing, buying land, financing projects, managing and implementing projects

3.9**project management**

coordinated activities to direct and control the accomplishment of agreed objectives

[SOURCE: ISO 21502:2020, 3.24]

3.10**territory actor**

organization or person developing an activity on the territory of the community

3.11**tool**

instrument that helps the *project developer* (3.8) to meet ISO 37101 framework principles

Note 1 to entry: A tool can be in a variety of forms, e.g. a dashboard, a procedure manual, a digital platform or device, methodology.

4 Context of the project**4.1 General**

The development or construction of projects or programmes in a city involves various actors in the different stages of these projects or programmes.

4.2 Requirements for a project inception**4.2.1 General**

The components of a baseline review are described in 4.2.2 to 4.2.4.

4.2.2 Project rationale (initial definition of the project scope)

A project rationale shall be provided, which gives a scope to the project in terms of its applicable internal and external factors. This should also include an assessment of the needs and expectations of any interested parties, appropriate to the project.

4.2.3 Situation (baseline review)

Regional mapping in terms of sustainable development (current and envisaged) should consider:

- Level of performance for each of the ISO 37101 SDGs.
- Analysis of the contributions of each action area and other projects to a community's purposes of sustainability.
- Analysis of applicable requirements, regulations and standards, the needs and expectations of interested parties and the identification of other organisations and governing bodies that are active:
 - during the inception and production stages;

- over the long term after the start of operation.
- Analysis of project risk during the three project stages (inception, implementation, long-term operation): impact assessment and potential contributions.

4.2.4 Definition of the project's operational management system within the region

The definition shall take into account:

- recognition of the system dimensions, the multi-actor approach and the multi-project/multi-action context;
- ensuring coherence with existing management systems and reference frameworks.

4.3 Tools

4.3.1 General

To support an efficient inception of the project, two main tools should be combined, the mapping tool key and the relevance tool key.

4.3.2 Stakeholders mapping tool

The aim of this tool is to collect all of the information that can improve the decision-making process. The tool shall cover:

- the figures on the territory at different scales;
- the data on the community and the various scope of decision including identification of stakeholders' expectations and potential contributions to the project;
- the steady state level of interaction between the project stakeholders and the territory.

Functionalities that tools shall integrate are detailed in [Annex B](#).

4.3.3 Relevance tool

- Objective: evaluating the contribution of a construction or development project to the city or community's sustainable development. The purposes that shall be considered are at least those described by ISO 37101:2016, 4.5. The contribution can be positive or negative depending on the purpose, the scope, or the horizon considered.
- Scope: covers at least the territory of the community in which the project is located. The horizon to consider (short-, medium- or long-term) shall be adapted to each project, but at least it covers the lifecycle of the project.
- The relevance analysis is based on a prior analysis of the existing context. The project is relevant if it upgrades the territory profile. It is intended for all stakeholders identified in the context analysis.

Functionalities that tools shall integrate are detailed in [B.2](#).

5 Leadership within the project context

5.1 General

The following ISO 37101 principles or implementation requirements for avoiding silo approaches are described in this clause:

- the management of urban projects;

- the need for new competences;
- appropriate tools;
- related leadership.

5.2 Requirements for a project implementation

5.2.1 Leadership and engagement

The project management team shall ensure

- awareness of sustainable development objectives,
- awareness of the principles of good governance and engagement with interested parties, and
- awareness on the place specific opportunities.

5.2.2 Political leadership

The project developer shall define how leadership is implemented in the project organization to ensure project top management is committed to achieve its missions in line with the community political leadership and with expected project contribution to community sustainability purposes.

5.2.3 Tools

Tools to manage the governance of the project shall take into account the following issues:

- competencies;
- responsibilities and authorities;
- decision making processes.

These tools may take advantage of a possible use of “Values, Rules, Knowledge framework” (VRK).

6 Planning during the project's three life cycle stages

6.1 General

This clause outlines the methods needed to identify consideration[s] which ensure that implementation by actors is aligned.

6.2 Requirements for project implementation

6.2.1 Involvement of interested parties and other projects

The project developer shall ensure that stakeholders of the project are identified and that action plans are in place to involve them in the project. This is done in order to understand stakeholders' expectations and social issues, to involve stakeholders in the definition and the implementation of the action plan in line with the expected project contribution to sustainable development of the community.

6.2.2 Definition of operational objectives

Operational objectives shall be set in relation to the project and should:

- be in line with the needs and expectations of interested parties;
- be specific, measurable, achievable, relevant, resources and time constrained;

— be accompanied by action plans and evaluation criteria to support them.

Analysis of performance against these objectives should be carried out and maintained as documented information.

6.2.3 Risk mitigation

The project developer shall ensure that social, environmental, financial and community risks are identified and assessed, and that action plans are implemented to mitigate the risks and to reach the expected project contribution to the community's sustainability goals.

6.2.4 Action plans for regional transfer

Action plans for transfer to the local community and ownership over the long-term by regional authorities shall be defined.

The approach is nesting of actions with an alignment defined by context and interested parties. See [Figure 1](#).

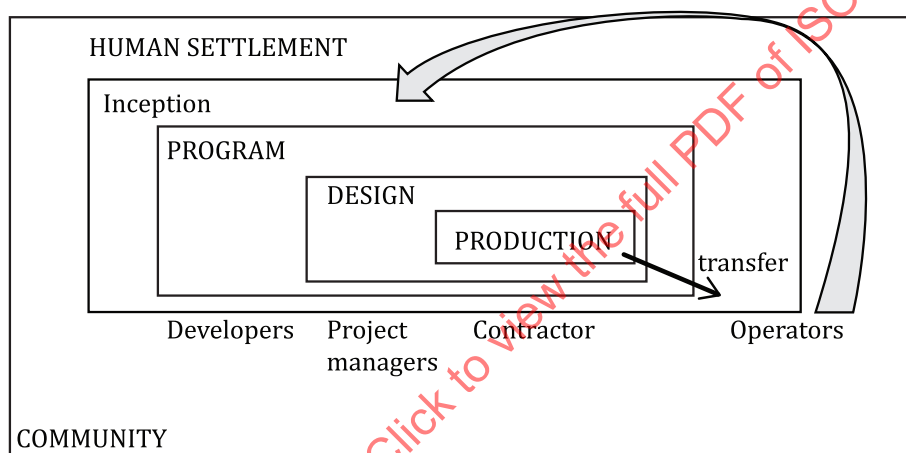


Figure 1 — Project life cycle within the built asset life cycles

6.3 Tools

6.3.1 Usual implementation tools

Tools to manage the planning, during the project's three life cycle phases shall take into account the following issues:

- methods to take into account stakeholders' consideration[s];
- adjustment of the project strategy;
- adjustment of the implementation plan and management processes.

6.3.2 Complementary aligning tool functionalities

The objective of the tool is to make sure that the vision and the governance of the project are shared. This tool shall provide each contributor with

- the definition of roles at each stage of the project,
- the process to achieve an individual added value, and
- a framework that is approved by all contributors of the project.

This tool shall integrate the functionalities detailed in [B.3](#).

7 Support during the project stages

7.1 General

This clause deals with determining enablers and significant engagement required during the three life cycle stages of a project.

7.2 Requirements for a project implementation

7.2.1 Financial aspects and human resources

The project developer shall ensure that financial aspects and human resources are in place in the project in accordance with ISO 37101 transparency principles and that financial investors are reporting in accordance with local environmental sustainability, social and economic requirements. See [A.2](#).

7.2.2 Other resources (Life cycle analysis/ Assessment)

Performance criteria are conceptualised. The methods should be based on criteria that can be measured.

7.2.3 Awareness raising and education

Requirements for awareness raising and education for interested parties shall be established based upon their appropriate involvement. These requirements shall be maintained as accessible documented information.

7.2.4 Communication

The project developer shall support communication within the relevant stakeholders' organizations and with interested parties, in accordance with ISO 37101 transparency principles.

7.2.5 Documentation traceability

In documentation traceability management, the project developers shall focus on items linked (directly or indirectly) to the community's sustainable development, in accordance with ISO 37101 transparency principles.

NOTE Project enablers can also include "capacity development".

7.3 Tools

Tools to manage the support during the project's three life cycle stages shall take into account the reports detailing conformance to performance requirement[s] throughout the project's life cycle, (including a commissioning stage).

Governance tools combine the usual project management tools in three categories in a mentoring perspective:

- the order of each task during the life cycle of the project;
- the commissioning protocol at each stage;
- the feedback regulation to ensure a common result built on a performance-based procurement system.

8 Operations (operational activities and transfer)

8.1 General

This clause describes tools to ensure that performance can be continuously improved during the project stages.

8.2 Requirements for project implementation

8.2.1 Involvement of interested parties and other projects

As mentioned in [6.2.1](#), the project developer shall ensure that the involvement of interested parties, throughout the project life cycle, takes into account the specific requirements of the project contribution to the sustainable development of the community.

The result of this action should also be a deliverable in accordance with ISO 21502.

8.2.2 Overseeing the coherence of strategies, projects, plans, and services

The project developer shall ensure that the project strategies, programmes, plans, and service management are consistent with other strategies, programmes, plans, and services in the community. The project developer shall ensure that the community management has full comprehension of the project strategy.

8.2.3 Transfer to the community — Support for transfer of ownership

The developer shall transfer to the operators, owners and other stakeholders all elements allowing them to operate and master, during the whole life cycle of the project deliverables, their contribution to the sustainable development of the community.

8.3 Tools

8.3.1 General

The management tools to manage operational activities during the project's three life cycle stages shall take into account:

- coordinated management;
- information and reporting to provide data which bring evidence to the sustainable assumption.

An overview of governance and management tools is detailed in [Annex A](#).

8.3.2 Transfer tool key

The objective of this tool is to make sure that the operators and other potential stakeholders of the project have full capability for operating the project in the long term.

This tool includes the commissioning process, modelling skills to operate and other required elements.

This tool shall integrate the functionalities detailed in [B.4](#).

9 Performance and evaluation

9.1 General

This clause provides tools to ensure adequate monitoring and evaluation during the operational stage of the project until the possible end-of-life of the project within a specified period of time. Performance shall be expressed as an objective.

9.2 Requirements for project implementation

9.2.1 Monitoring, measurement, analysis and assessment

See the two indicator classes defined in [Annex A](#).

Where monitoring means can be separated, an overview matrix should be maintained along with the necessary methodology to maintain the monitoring matrix(es).

Improving performance at any time requires improved coordination and organising information for effective discussion that are part of the requirements for performance evaluation by the project developers.

As monitoring is mentioned (in particular in [Clause 7](#)), the requirements of this clause cover the validation of monitoring devices (i.e. verifying that monitoring of stages is working).

9.2.2 Internal audit

The project developer shall implement audit plans to make sure project requirements involve the project expected contribution of the community's sustainable development performance.

9.2.3 Management review

Management review is intended to be implemented according to ISO 9001 recommendations.

9.3 Tools

Tools to manage performance and evaluation can consist of:

- dashboard (target indicators);
- monitoring matrix (monitoring indicators)
 - Digital twin.

This tool shall integrate the functionalities detailed in [Annex B](#).

10 Improvement

10.1 General

Improvement includes processes required in order to ensure that the project is able to transform and adapt in the long term, when necessary, e.g. to anticipate and prepare potential for a transformation or adaptation of the project in 10 years or more. Transformation relates to adaptive climate adaptation, i.e. the project can be used in a different way.

10.2 Requirements for project implementation

10.2.1 Non-conformance and corrective action

Identified non-conformances shall be investigated, proportionate to the risk that they pose to the project, for their root cause, and corrective actions shall be taken without undue delay.

10.2.2 Feedback

The project developer shall analyse the feedback of the project's potential contribution to community sustainable development and apply actions to address any risks or opportunities identified, as appropriate.

10.2.3 Continual improvement

The project developer shall ensure continual improvement of the expected contribution of the project to the sustainable development of the community, based upon information received, such as audit reporting and identification of nonconformities.

10.3 Tools

Tools to manage improvement during the project's three life cycle stages can consist of:

- operations dashboard;
- follow-up matrix.

An overview of governance and management tools are detailed in [Annex A](#).

Annex A (informative)

Conceptual perspectives

A.1 General

Project developers or other stakeholders in urban projects, or the structures that encompass them, are usually invited to meet the requirements of international quality management standards, e.g. ISO 9001 quality management requirements, ISO 31000 risk management requirements, ISO 14001 environmental management requirements. These quality management standards use a harmonized structure. Most of these requirements are considered in ISO 21502 and in the Project Management Body of Knowledge (PMBOK) [18], which defines the fields of knowledge covering project management and lists good professional practices in this area or in many management systems specific to project developers.

Requirements pertaining to social responsibility in ISO 26000 proceed from principles taken into account by ISO 37101 and consequently by this document as indicated in [Figure A.1](#).

[Figure A.1](#) summarizes the various management requirements by the "project developers" for whom this document is intended.

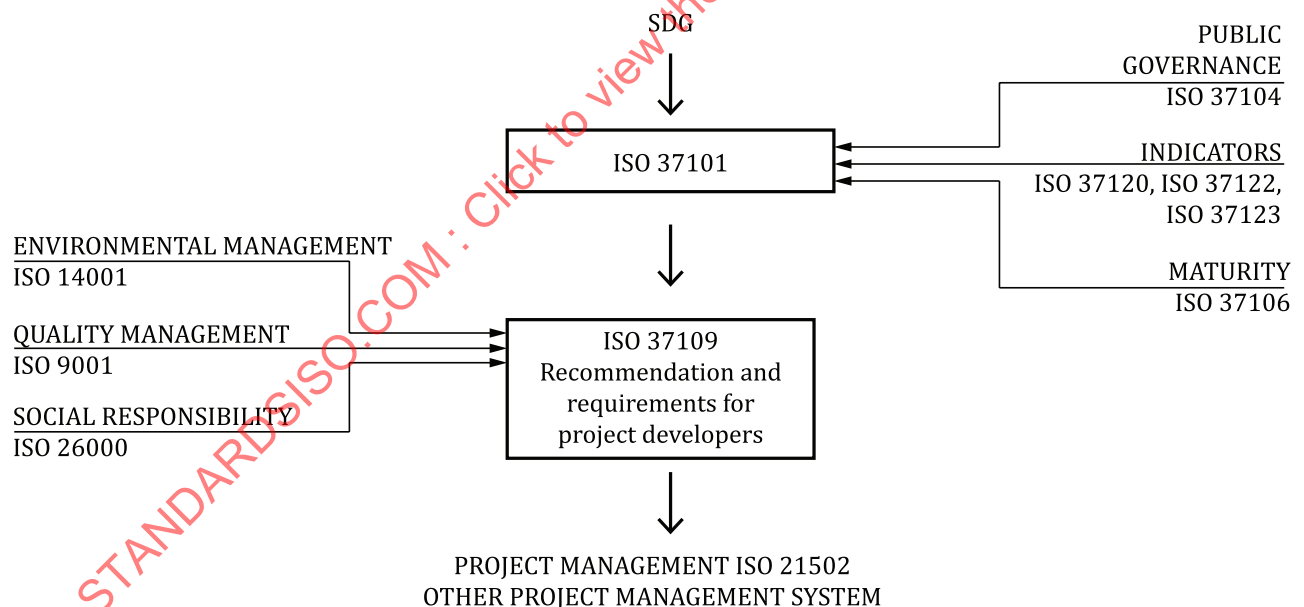


Figure A.1 — Normative urban built environment contributing to sustainability of community balance

The recommendations in this document consist of four specific tools:

- mapping of the territory actors;
- relevance analysis;
- aligning tool;
- transfer tool.

The recommended tool functionalities are described in [Annex B](#).

The recommendations of this document intended for “project developers” are consistent with the guiding principles applicable to project developers of the ISO quality management standards cited above, the use of standards of indicators which are linked, as well as the social responsibility standard (ISO 26000).

As an example, the requirements for the context analysis and related recommended tools (mapping the territory actors and relevance analysis) can be easily transposed and set up when setting up a QMS according to ISO 9001 requirements. Conversely, the satisfaction of the requirements of the QMS for leadership corresponds to recommendations for leadership in this document. However, none of the two management systems can replace the other.

Only ISO 37108 has specific indicators. Project developers can use ISO 37120, ISO/TR 37121, ISO 37122 and ISO 37123 indicators for defining their own indicators.

A.2 Summary of ISO 37101 principles applicable to project developers

A.2.1 General

The presentation of ISO 37101 basic recommendations and requirements, i.e. “principles”, have been extracted from ISO 37101 and have been adapted to project developers’ needs for conforming to ISO 37101 principles in project development. Taking these principles into account is essential at all stages and in all the topics of project management as illustrated in the [A.3](#) grids linking project management topics and stages with ISO 37101 principles.

A.2.2 Sustainability focus and decision making in project management

Sustainability: Urban projects must contribute to the sustainable development of the community/society. They have to take into account the wide range of economic, social and environmental issues that can affect the communities in the short- and long-term, the need for sustainability and resilience and they need to define clear sustainable purposes.

Coherent system management framework: Urban project management must be consistent with the issues and the strategic goals of the project and with the sustainable development community management framework.

Management systems and decision-making processes need to integrate sustainability purposes and holistic approach.

Project developers shall adopt a methodological framework consistent with the sustainable development community management framework.

Specifically, the systemic evaluation approach and the performance indicators need to be defined in coherence with the sustainable development community management system.

A.2.3 Holistic and systemic approach in project management

The capacity to foster common purposes is fundamental to achieve a community’s sustainable development objectives. Consequently, urban project issues shall be assessed and monitored by project developers through a holistic and integrated project management system.

A holistic approach includes good governance and adequate organisation, processes and behaviour and appropriate innovative use of techniques, technologies and natural resources.

A.2.4 Interested party engagement in project management

The needs and expectations of interested parties to be considered:

- Identifying the interested parties and their expectations is essential to identify the community issues, to define the coherent purposes and strategies, to settle and implement an inclusive sustainable development management system.

Interested party engagement in project management:

- The involvement of interested parties is crucial at all steps and it requires a process for engaging interested parties that avoids a silo approach and facilitates the cooperation of all interested parties.
- An appropriate multi-party management system should encourage interested parties to become proactive. It should help communities build consensus on sustainable development within communities.

Transparency of project management:

- To create confidence, cooperation and engagement, a multi-party management system needs transparency on, e.g. issues, purposes, processes, decision making.

A.2.5 Leadership

The project needs a project management system in line with the community management system which includes the following:

- The project developers shall take into account the organisational framework of the community.
- The project management shall define the resources needed to support the management of environmental, economic and social performance outcomes. The community shall provide sufficient resources.

Leadership to be established:

- The project management shall ensure the sustainable development and multi-party management system implementation, in coherence with the community.

A.2.6 Continual improvement in project management

The project developer shall establish a coherent framework based on the PDCA model.

The effectiveness and the efficiency of the project management system are continually improved; project management reviews include decisions related to continual improvement opportunities and any need for changes to the management system.

Performance indicators are based on a limited number of measurable, accurate and verifiable indicators.

A.3 Project management, sustainability frameworks, urban sustainability framework (USF) indicators

A.3.1 General

This clause questions how World Bank purposes and action areas with their accompanying methods and tools can be included in implementing ISO 37101 framework principles in project management along with other declaration frameworks. ISO 37120, ISO 37122 and ISO 37123 indicators set for urban smartness and resilience and the ISO 37120 city services and quality of life indicators, are supported by this document.

This document focuses on the ISO 37101 contributions to six purposes of sustainability across 12 action areas in implementing a project management system that essentially comprises a baseline review and

strategy definition, an action plan, monitoring, and above all continual improvement. Specific tools as well as project management practice functionalities recommended in this document incorporate the cross analysis of purposes and action areas, in order to implement the ISO 37101 principles. These include practices such as indicator cluster analysis; strategy analysis; gap analysis; materiality assessment; capacity projection; stakeholder management; change management; maturity analysis; performance monitoring; reporting.

Many of these tools are envisaged by the Urban Sustainability Framework (USF) [24]. The USF diagnosis stage aims to identify key focus areas that are globally relevant. They are equivalent to the ISO 37101 baseline review for the development of a sustainability strategy and are consistent with the relevance analysis in this document. For this stage, the USF recommends the use of data analysis, trend analysis, benchmarking analysis, strategy analysis, prioritisation analysis and scenario analysis (for both business-as-usual trends and intelligent, policy driven, growth scenarios).

The Global Platform for Sustainable Cities (GPSC) [24] measuring framework, is based on two concepts:

- Four "outcome dimensions" of a city.
- Two "enabling dimensions" of a city.

USF guidance part 2 [24], details sub goals of outcome and enabling dimensions key focus areas, their rationale and related key questions that can serve for the building of or for selecting relevant indicators, among those proposed. Among them are some from ISO 37120 which include new indicators that generally cover cross-cutting issues between sustainability dimensions.

A.3.2 Common ISO 37101/USF framework

As illustrated in Table A.1 below, the USF complements and supports ISO 37101 by separating out the management of action areas into an "enabling dimension" so that the enabling environment can be systematically organised and continuously improved using the PDCA management approach.

The USF outcomes dimension roughly corresponds to the same concepts as the six purposes of ISO 37101 grouped differently.

The GPSC Enabling Dimensions in Figure A:2 can be attached to the action areas of Table A.1. It covers "a programme of activities"; an "Enabler" purpose may be added to the ISO 37101 framework as suggested in Table A.1 to capture the performance of the enabling environment for each of the 12 action areas.

A-GOVERNANCE AND INTEGRATED URBAN PLANNING	B-FISCAL SUSTAINABILITY
Key focus areas 1. Vision and long-term strategic planning; 2. Stakeholders participation; 3. Data management; 4. Trend analyses; 5. Land use and zoning; 6. Urban growth patterns; 7. Informal settlements; 8. Transport and mobility integrated with land use; 9. Cultural heritage.	Key focus areas 1. Accountability and transparency; 2. Creditworthiness; 3. Revenue and financial autonomy; 4. Expenditure management; 5. Management of debt and other obligations.

NOTE Adapted from World Bank "Urban Sustainability Framework" (USF)[24], Figure 10 : Dimensions and Key Focus Areas of Framework.

Figure A.2 — Enabling dimensions

Table A.1 — Common ISO 37101 USF framework for urban sustainability purposes and action areas

Action areas	ISO 37101 Framework						
	USF measuring and enabler framework						
	Attractive- ness	Preservation improve- ment of En- vironment	Resilience	Responsible resource use	Social cohe- sion	Well-being	Enabling dimension
Governance							A - 1
Education							A - 9
Innovation							A 2
Health							
Culture							A 9
Living together (Cohesion)							A 8
Economy							B 1 to 5
Living Environ- ment (Environ- ment)							A 5 and 6
Security							A 7
Infrastructure							A 8
Mobility							A 8
Biodiversity (Ecosystems)							

A.3.3 Enabler contributions

As illustrated in [Table A.1](#), the USF complements and supports the ISO 37101 framework by separating contributions in each action area into outcome contributions and enabling contributions.

USF does this in order to focus on the enabling environment for each action area (most action areas require, at the very least, enablers for action-area-specific policies, legislation, regulation, capacity analysis, and decision making). As an example, and detailed by the USF, the separation into outcomes and enablers for the governance action area of the ISO 37101 urban sustainability management framework, stresses the need to develop methods and tools to manage collaborative, multi-level governance. Methods to evaluate action area enabler contributions that are summarised in the USF cover most action areas. They include for example:

- In “Governance action area”, e.g. vision and long-term strategic planning, stakeholder participation, data management, and trend analysis.
- In “Innovation action area”, e.g. access to finance, ease of doing business.
- In “Culture action area”, e.g. heritage management (policies, planning, regulation, awareness raising).
- In “Cohesion action area”, e.g. training, equality, job creation.
- In “Economy action area”, e.g. accountability and transparency, creditworthiness, revenue and financial autonomy, expenditure management, and the management of debt and other obligations.

- In “Living and working environment action area”, e.g. urban growth management (policies, planning, density mapping, land use survey); informal settlement management; affordable housing.
- In “Security action area”, e.g. food security; resilience planning.
- In “Infrastructure action area”, e.g. revenue streams; investment strategies; connectivity; universal access.
- In “Mobility action area”, e.g. mobility integration and transport management (origin/destination surveys, transport master planning, transport management, transport planning integration).

Thus, for example in culture action area, the appreciation of the contribution of actions in this area to the attractiveness of the community can be based on the level of cultural facilities and on actions contributing to developing them, but this appreciation can be usefully supplemented by the appreciation of the contribution of cultural facilitators such as the management of cultural heritage.

A.3.4 Assessment

While the USF describes a top-down approach where a city, as described in ISO 37104, establishes the various components of a coherent, integrated approach to urban projects, its common framework can be used both top-down and bottom-up as proposed in this document, without major difficulties arising.

Many challenges remain in using the common framework. For example, a basic consideration is the weighting that should be assigned to enabling as opposed to outcome criteria and indicators, whether they be used for baseline and trend analyses, strategic analyses, materiality assessment, or setting priorities, objectives and targets.

A.3.5 Highlighted contributions

The USF brings together some very useful recommendations for tools and methods needed to implement urban frameworks. The assessment of governance enablers not only calls for methods related directly to the governance action area (vision and long-term strategic planning; stakeholder participation; data management; trend analyses), but also tools related to other action areas (land use and zoning; urban growth patterns; informal settlements; transport and mobility integrated with land use; cultural heritage). Not surprisingly, the USF provides impressive recommendations on how to assess enablers for aspects of the economy action area, notably fiscal sustainability. Detailed recommendations and assessment criteria are given for:

- accountability and transparency;
- creditworthiness;
- revenue and financial autonomy;
- expenditure management;
- management of debt and other obligations.

As most relate to the economy action area with very few relating in detail to other action areas, this feature can need to be addressed at some stage. Aside from the assessment of the enabling environment, the USF provides useful recommendations for prioritisation analysis and action plans

A.3.6 Conclusion

The USF complements the ISO 37101 framework by providing an effective and practical approach to separate out those components of action in specific areas which deal with the enabling environment as opposed to performance outcomes.

The treatment of these factors mobilises a large set of indicators. Two classes shall be distinguished: the performance indicators which measure the outcomes and the means indicators which assess the enablers.

A.4 Project management processes and methods

A.4.1 General

While ISO 21502 and similar project management systems aim towards projects of a more diverse nature, this document is dedicated to projects to be understood as “urban and rural space, and ground planning projects” which encompass all urban components, e.g. buildings, infrastructure such as bridges or networks, public transport systems, open public space, urban services (see 3.7).

Many companies have developed in-house project management methodologies dedicated to this type of project. They most often use methods and processes similar to those clauses of the two major existing international project management guides, which are very closely related. This document uses consequently some ISO 21502 project management methods and processes (see [3]) as a reference without prejudging the possible use of other project management systems.

Three essential points differentiate the methods and processes of usual project management from methods and processes of project management taking into account the principles of ISO 37101, proposed in this document. Adaptations of usual project contract and delivery models can be necessary to take into account the following project management recommendations.

A.4.2 Project objectives

Project management focusses mainly, besides usual contractual and legal requirements, on the objectives and requirements expressed by the person, e.g. client, investor, having requested a project. Requirements for project developers meeting ISO 37101 framework principles, impose to integrate the following urban projects objectives : the project contribution to improve the balance of sustainability profile of a community in a holistic and global perspective, in the short-, medium- and long-term, far beyond the completion of the very project, and to adapt project management methods and processes accordingly as recommended in this document.

A.4.3 Project life cycle

In usual project management systems, the project life cycle is limited, by a clear start and end point, which is most often the achievement of contractual or para-contractual commitments for implementing a project and the start of operating project deliverables.

In line with communities' sustainable management principles, this document recommends adopting and considering a larger period of time for project management:

- The period before the project, exchanges and studies prior to the formalization of a project, that should be identified and considered.
- The period after the closing of a project, anticipating the whole life cycle of the project deliverables, and their outcomes.

This enlarged period corresponds to the period to be considered in the integrated project management approach presented in ISO 21502:2020, 4.4.

A.4.4 Project scope and issues

In usual project management systems, the scope of issues to be taken into account are mainly linked, and usually limited, to contractual or para-contractual requirements.

In line with communities' sustainable management principles, this document recommends considering a larger scope of issues and territories. It can vary according to the components of project deliverables and outcomes, in order to best meet ISO 37101 principles for a community and linked territories where a project is implemented.

A.4.5 Integrated project management

ISO 37101 principles applicable to project developers ([A.2](#) of this document) and considerations on pre-project activities and post-project activities as required in this document (Context organisation [4.1](#) and transfer [8.2.3](#)), require integrated project management practices described for example in ISO 21502:2020, Clause 6.

This document proposes tools (mapping of the territory actors, relevance analysis, aligning and transfer) with specific activities of integrated project management activities such as those presented in ISO 21502:2020, 6.2 and 6.5:

- pre-project activities;
- initiating a project;
- controlling a project;
- managing delivery;
- closing of project;
- post-project activities.

The specific objective is meeting ISO 37101 framework principles and improving urban project contribution to the sustainable development profile of a community.

Project management practices, as the following described in ISO 21502:2020, Clause 7, can be used when undertaking the integrated project management practices with the use of specific tools presented in this document. They should include additional functionalities for integrating communities' sustainability principles and key project functionalities in project management described in [Annex B](#) of this document such as:

- Planning/scheduling management;
- Scope management;
- Resource management;
- Cost management;
- Risk management;
- Quality management;
- Stakeholder engagement;
- Communication management;
- Procurement management.

Thus, project management practices contribute to a new stable equilibrium of the ecosystem consisting of the project, its deliverables, its outcomes in the communities and territories where urban projects are located (see [Table A.2](#)).

Table A.2 — Schematic tables for adapting project management systems, taking into account the ISO 37101 framework principles of sustainable development

ISO 37101 principles — Implication on usual project management practices and stages									
Usual project management practice stages	Planning	Scope	Resources	Cost	Risk	Quality	Stakeholder	Communication	Procurement
Initiating	Project management initiating stage should include exchanges and studies that shall be identified and considered for meeting ISO 37101 framework principles prior the formalization of a project.								
Planning	The involvement of interested parties is crucial at all steps; Project management must secure a process for engaging interested parties that avoids a silo approach, facilitates the cooperation of all interested parties and ensures the global consistency of the project.								
Implementing	Project management needs to ensure the sustainable development and multi-party management system implementation, in consistency with the community planning.								
Monitoring	Project management should give a special focus to the sustainability performance trend of the ecosystem consisting of the project, its deliverables, the city where they are located and impacted territories.								
Closing	Project management closing stage should go beyond the project deliverables' performances and operating contractual conditions' hand over; it should include preparation and transfer of all required available elements for the contribution of the projects' deliverables throughout their life cycles, to a continually improved stable equilibrium of the ecosystem consisting of the project, its deliverables, the city where they are located, and impacted territories.								

A.5 Project governance and management

A.5.1 Recommended tool functionalities to be incorporated in management practices for projects

Urban projects must play their part for achieving a global sustainable development of the community and society. This means that management practices should associate at relevant stages, from the initiation stage to the project closing stage, community leaders, the project developer, as well as relevant stakeholders for achieving clear sustainable purposes for the urban ecosystem. Sound planning systems including the follow up of external and internal sustainability issues that are relevant to these purposes, and specific functionalities, must be incorporated throughout the project development in project management practices for improving these practices' contribution to the sustainable profile of the community and related territories, keeping in mind the whole life cycle of the project deliverables.

The involvement of interested parties is crucial at any step in which they can be relevant, but whenever possible, at an early stage, and needs a process for identifying and engaging interested parties and their relevant needs and expectations (see [B.1](#)).

This annex refers to the most common project management practices, in particular to most of those described in ISO 21502:2020, Clause 7, reclassified according to the three phases of the life cycle of a project presented in the Introduction to this document.

[Figure A.3](#) illustrates the principle.

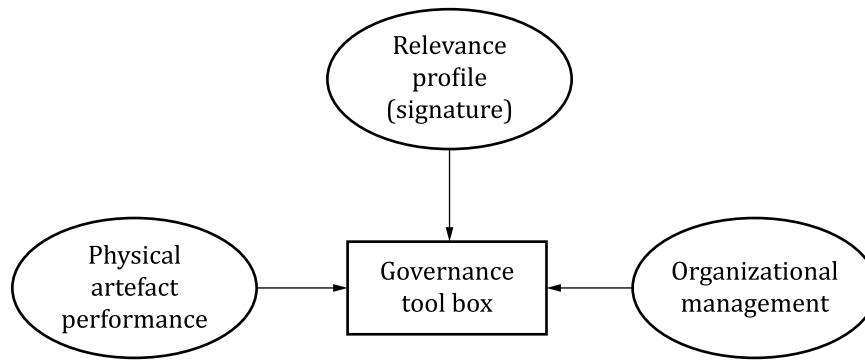


Figure A.3 — Governance tool principle

A.5.2 Functionalities in project management practices for product definition

A.5.2.1 Integration process

- This extends the range of issues usually considered in project management practices, e.g. to those related to the economic, social and natural environment of communities and their interactions, for a holistic and integrated approach of the urban project development being implemented. They can have strategic, operational and competitive implications which can impact the sustainable development profile of the community and linked territories, at short-, medium- or long-term.
- Incorporating relevant inputs required for the operation of ISO 37101 identified principles in project management practices, considering clear set up leadership and commitment, for providing them.
- Adapting integration processes for a holistic approach, including adequate organisation, processes and behaviour, and appropriate innovative use of techniques, technologies and natural resources.
- Involving interested parties through a multi-actor process to be implemented by the project developer in line with the community that can take different forms in order to avoid a silo approach, facilitate the cooperation of all interested parties in a cooperative dialogue for more sustainable solutions and help communities build consensus on sustainable development within communities.

A.5.2.2 Scope management

- This extends, in line with local authorities, the scope of the project for assessing the sustainability performances trend of the ecosystem consisting of the project, its deliverables, the city where the project is located and the impacted territories, to an identified coherent framework that can evolve during the project development and during its deliverables' life cycle.
- It is applicable to various territorial boundaries at local district, city, community, regional or national levels, in defined urban or rural areas, at their respective level of responsibility, for managing and operating project.

A.5.2.3 Stakeholder engagement management

- Stakeholder engagement in line with shared ISO 37101 principles, is important for the relevance of the project, its operational implementation, its appropriation by the actors of the community and the project. Stakeholder management aims to involve stakeholders throughout the project, e.g. identification of stakeholders, analysis of their expectations, involvement in defining objectives and action plans, evaluation and information, continual improvement, in line with ISO 37101 principles applied to the project.

A.5.3 Functionalities required in project management practices mainly at planning/scheduling and implementing stages

A.5.3.1 Planning / scheduling management

Extending planning / scheduling management beyond the project closing stage for anticipating the sustainability performance trends of the ecosystem possibly including the project deliverables life cycle consideration for relevant decisions to be anticipated

A.5.3.2 Cost management

Extending cost management to overall global costs including externalities of a project and of its deliverables, considering their whole lifecycles.

A.5.3.3 Quality management

Extending the quality management of the project to the sustainable performance quality trend of the ecosystem.

A.5.3.4 Resources management

Extending consideration on resources potential contribution to the community sustainable development performance trends for the long term, e.g. the limited resources of the planet, with a special focus on alternative solutions.

Considering identified specific resources dedicated to sustainable development of the community that can be required at the appropriate level of authority from relevant identified partners for incorporating ISO 37101 principles in project management and in project deliverables. They should include resources of any type (e.g. products, equipment finance, methodology, information) provided by identified partners (local authorities suppliers, contractors, local people, organisations and infrastructures, as well as those inherent in the culture of a community).

A.5.3.5 Communication management

Supporting communication within the relevant stakeholders' organisations and interested parties, in order to meet ISO 37101 transparency principles and stakeholders required involvement especially:

- The responsibilities and authorities for relevant roles of project management.
- Valid and accessible reporting, with the opportunity for feedback and constructive challenge.
- The scope, strategy and objectives of the project management system.
- Documented information that should be adequately protected since access can imply a decision regarding the permission to view the documented information only, or the permission and authority to view and change the documented information.

A.5.3.6 Risk management

A specific consideration on the risk to the ecosystem, sustainable development performance along the project and its deliverables life cycles.

Including in planning processes and methods, to be implemented by the project developer, where relevant, a periodic baseline review, relevance analysis (see [B.2](#)) and conformance obligations for sustainable communities and determine the risks and opportunities that need to be addressed.

A.5.3.7 Procurement management

Supporting joined-up delivery and innovation across organisational boundaries within the community, as recommended in ISO 37101 (see [A.2](#), Summary of ISO 37101 principles).

Extending procurement to “sustainable procurement” as commented for example in UNEP Guide [\[23\]](#).

A.5.4 Functionalities required in project management practices for monitoring/reporting

The assessment and monitoring by project developers of an urban project contribution to the sustainable development profile of the ecosystem (community and surrounding territories) through a holistic and integrated project management system:

- Support for an iterative cross-analysis of purposes and issues to be undertaken periodically; Environmental performance includes assessing the performance of communities in progressing towards sustainable development outcomes and fulfilling conformance obligations.
- Environmental performance methods, including proactive and reactive, qualitative and quantitative indicators especially from ISO 37120, ISO 37122, ISO 37123, have to be implemented. Two types of indicator shall be distinguished:
 - Measurable performance indicators, measuring the outcome, as a basis for tracking progress in achieving sustainable development and continual improvement of the project contribution on the community sustainable development profile.
 - Means indicators which assess the enablers.
- A periodic regular performance evaluation of the project's contributions, to ensure its continuing suitability, adequacy and effectiveness. It generally consists of comparing the information available before and after project implementation, e.g. to assess behavioural change in interested parties, or improvement in environmental performance.
- Assessing the levels of smartness and resilience of the community that is impacted by a project, while considering that “sustainable development” is the overarching process, smartness and resilience being characteristics.
- Assessing the involvement of interested parties in a project management system is reviewed at planned intervals.
- Including decisions related to continual improvement opportunities and any need for changes to the management system.
- Considering the suitability, adequacy and effectiveness of the project management system itself and its continual improvement as recommended by ISO 37101.

Providing and maintaining documented information for the assessment by the project developers of the impacts of community relevant strategies, programmes, projects, plans and services, or in surrounding territories.

Annex B (normative)

Key tools

B.1 General

The recommendations consist of four specific types of tools:

- mapping of the territory actor tools;
- relevance analysis tools;
- aligning tools;
- transfer tools.

This annex includes the details of the four tools.

B.2 Mapping of the territory actor tool

[Table B.1](#) includes the details of the territory actor tool.

Table B.1 — Mapping of the territory actor tool

1. Tool description	
— Purpose  Figure B.1 — Mapping principle	The development project is part of a puzzle. See Figure B.1. The aim of this tool is to identify territory actors, their expectations, their importance, their potential contribution to the project. All this information can improve the decision-making process related to the project during its life cycle. It covers: — The identification of territory actors and all stakeholders. — Their expectations, their strategies. — Their importance for the project. — Their potential contribution to the project. — The data on the community and the various scopes of decision. — The steady-state level of interaction between the project stakeholders and the territory.
— Characteristics	A data management system dedicated to support the management of information on territory actors and of potential interrelations between this information and actors.
— Benefits	The mapping of the territory actors contributes to decision-making and project implementation:

Table B.1 (continued)

	— Identification of the social, economic, environmental issues of the community and of the project. — Identification of the major potential contributors for the project. — Identification of all stakeholders impacted and involved by the project. — Identification of existing strategies and action plans in the community. — Ability to take into account the interrelations between actors and issues. — Identification of the more efficient actions to implement. — Identification of means to be implemented to support the implementation of the project.
— Tool users	The project developers, the communities: — All stakeholders involved in urban projects aimed at ISO 37101 or similar sustainable development principle implementation for urban projects. — Users of relevance analysis tools.
2. Process for using the tool	
— Inputs	The territory actors and stakeholders of the territory: — Their expectations, their importance on the project and on the territory. — Their potential contribution. — Their action plans and strategies.
— Outputs, deliverables and output use	Stakeholders and their related potential impact on the project's contribution to sustainable development of the community, through their identified strategies, programmes, projects, plans and services.
— Process for using the tools	A systemic analysis of territory actors and stakeholders, their expectations, their strategies, their importance for the project, their potential contribution to the project. A use throughout the life cycle of the project and especially at key steps of the project. An updating process throughout the life cycle of the project.
— Application of the tool	Throughout the life cycle of the project and especially at key steps of the project.
— Necessary skills for implementing the tool	Awareness on the importance of stakeholders and territory actors for the project and the community. Management of the coherence of the stakeholder mapping.

B.3 Relevance analysis tool

[Table B.2](#) includes the details of the relevance analysis tool.

Table B.2 — Relevance analysis tool

1. Tool description	
— Purpose	Territory sustainable development profile upgrading.

Table B.2 (continued)

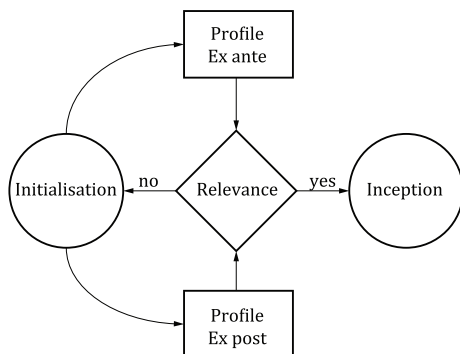


Figure B.2 — Relevance tool principle

	— The relevance analysis functionalities aim at supporting the evaluation of a project's contribution to the city or community's sustainable development, from existing situation (Ex Ante), to a situation with the project implemented (Ex Post). See Figure B.2. — The project can be considered "relevant" if the territory sustainable development profile is modified in a positive way (upgrading). If it is the case, inception of the project can be launched. — Tool implementation: This tool is implemented by the project manager team mandated by the developer. The transfer matrix between purposes and indicators facilitates two sustainable development profile designs: — Context sustainable development profile; — New sustainable development profile including the project impact.
Characteristics	To store and manage data with relevant indicators on the situation of a defined territory, as regards at least each ISO 37101 sustainable development territory's purposes — before project implementation (Ex Ante); — after it (Ex Post); — on sustainable development territory's purposes, when existing.
— Benefits	The sustainable development of the territory where the project is implemented and the project acceptance: — Making information related to sustainable development contribution of projects available to all project shareholders, with relevant grids and graphs. — Supporting comparisons and decision making. — Facilitating updating of these data throughout the project life cycle. — Potential external communication. — Validation of inception launch.
— Tool users	— All project shareholders. — All citizens.
2. Process for using the tool	
— Inputs	— Data collection on previous context situation. — Data on the potential project impacts. These data can be issued from ISO 37120, ISO 37122 and, ISO 37123 list of indicators or other regional data-bases and the main project specifications.