



# The Biodiversity Net Gain Mandate

**UK BNG (10% minimum), the EU Nature Restoration Law, and Europe's Biodiversity Strategy 2030 are reshaping how assets are planned, built, financed, and managed.**

LEGISLATIVE FRAMEWORK & STRATEGIC IMPLICATIONS

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# Why This Matters Now

## Nature as Regulated Infrastructure

From 2024, BNG is mandatory for most developments in England. Biodiversity is now a compliance requirement, an ESG obligation, and a value driver.

## EU Restoration Targets

The Nature Restoration Law requires 20% of land and sea restored by 2030, and all degraded ecosystems restored by 2050.

 Source: European Commission, NRL explainer

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# What the BNG Mandate Requires

UK FRAMEWORK

Part of the Environment Act 2021, BNG requires developers to deliver measurable biodiversity improvements with long-term accountability.

1

Minimum +10% Uplift

Biodiversity gain measured against baseline conditions

2

Biodiversity Metric 4.0

Standardized measurement framework for habitat assessment

3

30-Year Security

Habitat improvements must be legally secured for three decades

4

On-Site Preference

Off-site delivery only permitted when on-site is not feasible

**Key implication: No BNG, no planning approval.**

Source: UK Government BNG Policy Guidance

# EU Restoration Law & 2030 Strategy

## The European Context

The EU's restoration mandates go significantly further than the UK's, establishing comprehensive ecosystem recovery targets across member states.

## Restoration Targets

- Restore 20% of land and sea by 2030
- Restore all degraded ecosystems by 2050
- Obligatory restoration of urban green space, wetlands, rivers, forests, and pollinator habitats
- Urban tree canopy must be increasing—not declining

## Investment Implications

For cross-border developers and funds, EU restoration law will influence investment criteria, asset planning, and risk screening across all European operations.

📄 Sources: EU Nature Restoration Law & EU Biodiversity Strategy 2030

# Benefits for Building Inhabitants

## Residential & Commercial Occupants

Nature integrated through BNG and NRL frameworks **directly improves occupant wellbeing and productivity** with measurable outcomes.



### Air Quality Improvements

Urban vegetation can **reduce particulate matter by up to 24%**, creating healthier indoor and outdoor environments.



### Thermal Comfort & Heat Reduction

Green infrastructure can **reduce surrounding temperature by 2–5°C**, lowering heat stress and improving comfort year-round.



### Wellbeing & Productivity Gains

Employees with access to nature experience **6% higher productivity and 15% higher wellbeing scores**.



### Property Value & Satisfaction

Homes near quality green space **see value uplifts of up to 15%**, with higher resident satisfaction rates.

📄 Sources: WHO, European Environment Agency, Human Spaces Global Report, UK Natural Capital Accounts

# Benefits for Natural Systems & Biodiversity

BNG and EU restoration mandates deliver measurable ecosystem-level improvements that strengthen ecological resilience and reduce environmental risk.



## Migratory Species Support

Restored wetlands increase bird biodiversity by up to 40%, supporting critical migration routes.



## Improved Water Quality

Nature-based stormwater systems remove 70–90% of pollutants, protecting waterways and aquatic life.



## Urban Habitat Connectivity

Pollinator networks can increase species movement by 25–60% when green corridors are added.



## Soil Health Restoration

Restoration increases soil carbon stores by 20–70% within 20 years, enhancing long-term ecosystem function.

**These gains reduce ecological risk and align portfolios with emerging biodiversity disclosure standards including TNFD and EU Taxonomy requirements.**

**Sources: Ramsar Global Wetland Outlook, US EPA, EU Pollinator Initiative, IPBES Global Assessment**

# Benefits for Investors, Developers & CRE Professionals



**Nature is now capital.**

Source: World Green Building Council — Business Case for Green Buildings

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01

## Regulatory Compliance & De-risked Planning

Non-compliance with BNG or NRL can block approvals, delay projects, or create stranded assets.

02

## ROI Benefits

Green buildings deliver up to 12% higher rental premiums and up to 9% lower operating costs.

03

## Future-Proofing Against Regulation

BNG now; but EU-style restoration metrics may become UK-wide in time. Early movers reduce transition risk.

04

## Access to Sustainable Finance

Nature-positive investments qualify for sustainability-linked loans, EU Taxonomy-aligned financing, and improved credit ratings.

# Case Studies Demonstrating Value Creation



UK — St George's London

## **171% BNG Uplift**

Extensive green roofs, new habitats, and water-sensitive design **accelerated planning approvals and delivered significant brand value uplift.**



Netherlands — Room for the River

## **Protecting 4M People**

Floodplain restoration protecting millions of residents while **avoiding billions in potential flood damages** through nature-based solutions.



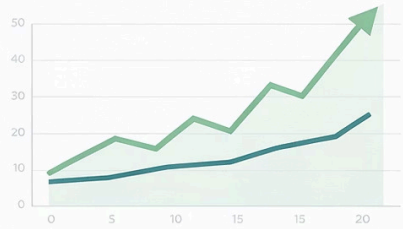
Copenhagen — Cloudburst Strategy

## **€1.3B Damages Avoided**

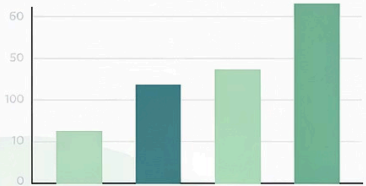
**300+ green infrastructure projects** delivering combined climate resilience and biodiversity benefits across the city.

These examples demonstrate the **combined climate + biodiversity ROI achievable through strategic nature integration.**

## Carbon Reduction



## Renewable Energy



## Sustainability Goals



# What Developers & CRE Leaders Should Do Now



## Update Feasibility & Planning

Embed BNG and NRL obligations into site selection, masterplanning, and due diligence processes.



## Commission Early Surveys

BNG requires baseline habitat measurement before design begins. Start ecological assessments early.



## Set Portfolio Targets

Aim for above-compliance: 15–20% BNG, aligned to EU restoration timelines for competitive advantage.

## Integrate Natural Capital

Include avoided climate risks, insurance savings, and rental premiums in investment underwriting models.

## Build Strategic Partnerships

Collaborate with ecologists, habitat banks, NbS suppliers, local authorities, and NGOs for delivery excellence.

## Prepare for Nature Disclosure

Align with TNFD, EU Taxonomy, and CSRD requirements for EU-exposed operations.

# Summary & Call to Action

BNG and EU restoration laws redefine what "good development" looks like. The winners will be those who treat nature as strategic infrastructure—not compliance cost.

## **Better Buildings**

Enhanced design quality and performance

## **Healthier Occupants**

More productive, satisfied inhabitants

## **Restored Ecosystems**

Measurable biodiversity gains

## **Stronger Performance**

Future-proofed investment returns

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