

# **The CLGE Code of Professional Qualification for Property Surveyors**

## **A harmonization of best practices in Europe**

**Matjaž GRILC, Slovenia, Vladimir KRUPA, Croatia, Jean-Yves PIRLOT, Belgium and Robert RACHWAŁ (Poland)**

**Key words :** Professional Qualifications, Property Surveying, Ownership Guaranties

### **SUMMARY**

With this paper, the authors present the Code of Professional Qualifications for Property Surveyors developed by CLGE. This Code is the successor of the Accord Multilateral, created in the early 2000s, under the auspices of Geometer Europas, and promoted with the support of its sister association CLGE. The two organizations have merged in 2010 and this has led to the idea to modernize the initial Accord.

On the 23rd November 2004, the then 7 member countries of Geometer Europas decided to sign this Multilateral Accord. They were later joined by 8 other countries, making it a total of 15 CLGE members as signatories.

CLGE has updated the initial code and on 14 March 2016, it was solemnly signed by most members of the CLGE Interest Group - Publicly Appointed and Regulated Liberal Surveyors. These IG-PARLS members, i.e. the former Geometer Europas members, agreed unanimously about the content of the new Code, but for practical reasons, the not represented members would join later on.

In the same way as the initiators of the Accord Multilateral, the signatory associations aim for high qualifications for the admission to the profession of European Property Surveyor and by doing this they want to promote the mobility of the profession in Europe and beyond without endangering the quality of the existing property systems.

The formula of the professional qualifications property surveyors are aiming at holds in one line: Property Surveyor = Master (5 years) + Traineeship (2 years) + Final Examination. On top of this, there should be an oath, an ethical code, an independent penalty board, mandatory CPD, a liability insurance and a quality control.

The presentation of the code at the FIG Congress in Warsaw contributes to a better understanding of the ceremony CLGE is organising on this occasion. Indeed, currently, at least one of the leading Polish Surveying Associations has decided to sign the Code of Professional Qualifications for Property surveyors and we hope that others will join them soon.

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### 1. INTRODUCTION

With this paper, the authors present the Code of Professional Qualifications for Property Surveyors (CPQPS) developed by CLGE. This Code is the successor of the Accord Multilateral, created in the early 2000s, under the auspices of Geometer Europas, and promoted with the support of its sister association CLGE. The two organizations have merged in 2010 and this has led to the idea to modernize the initial Accord.

On the 23rd November 2004, the then 7 member countries of Geometer Europas decided to sign this Multilateral Accord. They were later joined by 8 other countries among the CLGE members, making it a total of 15 CLGE members as signatories. This work was done under the visionary President of Geometer Europas and Past President of [BDVI](#), [Dr. Otmar Schuster](#).

CLGE has updated the initial code and on 14 March 2016, it was solemnly signed by most of the members of the CLGE Interest Group - Publicly Appointed and Regulated Liberal Surveyors (IG-PARLS) - which is actually the successor of Geometer Europas as integrated in CLGE. These IG-PARLS members agreed unanimously about the content of the new Code, but for practical reasons, the not represented members would join later on.

In the same way as the initiators of the Accord Multilateral, the signatory associations of the CPQPS aim for high qualifications for the admission to the profession of European Property Surveyor and by doing this they want to promote the mobility of the profession in Europe and beyond and, of course, guarantee the work performed in property surveying and the resulting property system.

Modern technologies allow virtually anyone to take measurements. Today, technology and expensive instruments are no longer a problem, today it is more important than ever to know the contents of land cadastre records and to protect property and apply mediation techniques to ensure consensus about the borders.

Moreover, it is important to point out that we are in an age of connecting different data (NSDI), where cadastral data form the basic register - the only one that links technical characteristics to property. This is a great responsibility and technical complexity that modern geodesy and modern property surveyors must take care of.

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of this, there should be an oath, an ethical code, an independent penalty board, mandatory Continued Professional Development (CPD), a liability insurance and a quality control.

The presentation of the code at the FIG Congress in Warsaw undoubtedly contributes to a better understanding of the CLGE ceremony is organising on this occasion. Indeed, currently, at least one of the leading Polish Surveying Associations, called Polish Commercial Geodesy-[Employers Association of Geodetic-Cartographic Firms] has decided to sign the Code of Professional Qualifications for Property surveyors and we hope others will join them soon.

## **2. APPLICABILITY OF THE CODE TO THE PRIVATE AND PUBLIC SECTORS**

The topics covered by this Code are related to legal regulated cadastral work (in the field of real property formation, modification and registration), property and land management activities to ensure reliable cadastral systems and land registries and to secure and protect property rights. These basic systems and registers are fundamental infrastructural elements in every society in order to secure the rights and ownership of property. It is imperative that all issues related to property are considered trustworthy and treated reliably.

In the first instance, the surveyors covered by this code are publicly appointed or regulated property surveyors acting professionally in the field of cadastral, property and land management systems - all acting in a liberal profession.

Since their professional activities normally combine those of publicly appointed property surveyors and those of regulated property surveyors, the property surveyors, acting in the cadastral process, can be characterized as follows:

- The Publicly Appointed Property Surveyors represent the state in the cadastral process or the act “on behalf of the state” in the cadastral process.
- The Regulated Property Surveyors act under a more or less restrictive public legal regulation in the cadastral process.

The profession is a major player in countries where the cadastre and land register tasks are entrusted to the private sector by law.

To assure a high common European professional level and a strong customer protection in legal issues related to land and built property and in other work executed by property surveyors, this Code defines and recommends necessary professional qualifications and prerequisites as well as professional business and disciplinary requirements.

It is important to note that the initiative for this code came from the private sector, representing liberal professionals. This does not mean that similar requirements should not apply to countries in which the cadastral and property surveying is assigned to civil servants. Hence, this code defines in general the same skills and professional demands required for surveyors under state employment. A combination of private and public surveyors are also covered by this Code.

### 3. STRUCTURE OF THE CODE AND LEVEL OF ACCEPTANCE

On top of the requirements covered in the next section “Content of the Code”, the CPQPS also consists of

- a “Letter of intent” - to be used by other CLGE member countries than the IG-PARLS member countries and other countries having the intention to implement or promote professional qualifications
- a “Report” - an additional dynamic explanatory report with national presentations. Published at [www.clge.eu/ig-parls](http://www.clge.eu/ig-parls) and related to the [Dynamic Professional Knowledge Base or DPKB](#).

Actually, CLGE - IG-PARLS is the driving force behind the Code of Professional Qualifications for property surveyors. However, there are many other CLGE member countries, in which similar public appointments and regulations exist. Hence, many of the members have signed the CPQPS so far, and others will follow.

The difference made between the Letter of intent and the signature of the actual CPQPS is that those who sign the Letter of intent acknowledge that the prescribed system is what they are striving for but that under current conditions, they do not meet all the requirements yet.

Hereafter we give an overview of the signing process so far. Seven Countries have signed for approval on behalf of their associations, during the Brussels ceremony in the House of the European Surveyor and GeoInformation (BE), on 14 March 2016, i.e. Belgium, Croatia, Denmark, France, Germany, Slovenia and Switzerland. Austria and the Grand Duchy of Luxembourg could not make it at this date but they agreed on the principle to sign as soon as possible.

In Potsdam (DE), on 29 September 2017, delegates from Austria, Romania and Slovakia have signed, followed by the ceremony in Barcelona (ES), on 06 October 2018, with signatures by delegates from the Czech Republic, Greece, Spain and Russia.

The last ceremony so far took place in Sofia, on 23 March 2019 by with signatures by Bulgaria, North Macedonia and Albania. While the latter signed the Letter of intent, all the other delegates have signed the full CPQPS.

Keeping in mind that the Grand Duchy of Luxembourg didn't make it to any of these gatherings but is more than willing to sign the CPQPS, this gives us a total of 18 countries adhering to the CPQPS so far, one of them via the Letter of intent.

Recent work on the European Requirements for Property Surveyors that will be published soon, shows that this model is widely spread in the European Union and Europe. Many other signatories could potentially join.

#### 4. THE CONTENT OF THE CODE

The basic requirements for the profession are:

<b>Professional qualifications and prerequisites</b>		
Education	5 Years on University level consisting of a bachelor (3/4 years) and master (1/2 years) in surveying and cadastral science	To ensure the academic level and the research options in the areas of - Surveying and mapping - Cadastre and land management - Spatial planning - Property design and development - Cadastral and real estate law - GIS (Geographic Information Systems) - etc.
Practice	Min. 2-3 years of practice in a Licensed Property Surveyors office or in a cadastral administration doing cadastral work, undergoing further education	To establish the necessary experience and knowledge to the requirements in practice
Approval	Approval of professional skills, generally based on an examination, by state / federal board or commission, State recognized professional commission, second State examinations commission etc.	To secure professional skills and knowledge in practice
CPD	Continuing professional development. The requirements are at least 20 hours per year.	To maintain professional development and quality. The CPD shall be controlled by the local organizations or by the State
<b>Professional business and disciplinary requirements</b>		
Appointment	Awarded according to State law, for instance supplemented by oath	To ensure the necessary professional qualifications of the surveyor
Insurance	An obligatory insurance system defined by the State authorities	To show responsibility and support customer protection
Penalty board	A penalty board independent from the surveyor's organization to settle complaints about the surveyor's work.	To maintain trust and quality by applying state requirements and support customer protection.

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	It must have the power to temporarily or permanently revoke an appointment or license.	
Quality control body	A committee defined by the surveyors' association, or by the State, providing advisory opinions and guidelines on professional matters and defining the “Bonus Pater” professional.	That ensure the permanent high professional quality of the surveyor's work and to customer support who have questions or complaints about the surveyor's work.
Ethical code	An ethical code as guideline for the surveyor's work - national codes and / or The <a href="#">CLGE Code of Conduct</a> is ratified by most European Countries.	To have high ethical principles for surveying services and support customer protection.

## 5. THE IMPORTANCE OF THE CODE AND CONCLUSIONS

In our information societies, authoritative data are of great importance whenever security is at stake. This is true for data in general but of course it is particularly true for geo-data and geo-information (GI). Probably GI has a special role in this circumstance since it is the access key to many data of other types.

This is true for the many areas of interest in which physical security is directly at stake, but also for important aspects related to property - we are talking about legal security. The real estate market is an important asset in national economies. In Switzerland, for instance, one can estimate that there are more than 900 billion of Swiss Francs in mortgages. This money goes into the economy and the role of geodetic surveyors, especially property surveyors, in guaranteeing the property shouldn't be underestimated.

A high level of regulation exists when civil servants are performing the tasks, e.g. police officers maintaining security and order or civil servants performing cadastral and property surveying. Another high level of regulation is attained when the State outsources a piece of its authority to liberal professionals, acting on behalf of, or even as the State. In the property surveying sector, we speak about publicly appointed surveyors.

Many states have installed a professional regulation for geodetic surveyors. In several among them this leads to a public appointment, quasi-public appointment or de facto public appointment as far as property surveying is concerned. Property surveying can be considered to be a sovereign task, firstly because private and public property, guaranteed by the State, can be considered fundamental and secondly because a reliable cadastre is one of the foundations of a well-functioning economy, where huge investments and mortgages are enshrined in the trust inspired by the quality underlying system.

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One has to emphasize the importance of the protection of property, i.e. ownership in land and buildings. People entrust surveyors with their property because of their high educational level and their trustworthy professional standards. This is based on a long tradition and has created a great credibility of the existing cadastral / property systems. Our ambition is to maintain this tradition via a widely accepted Code of Professional Qualifications for Property Surveyors, and thus to guarantee the Sustainability of our systems. This is true in Europe but also in developing parts of the world and that's why we insist on adding the S in SFfP, i.e. the Sustainable Fit for Purpose paradigm.

In our paper on Smart Regulation we have detailed the conditions enabling states to outsource the exercise of official authority as far as property surveying is concerned. The Code of Professional Qualifications for Property Surveyors that we have described above is one of the pillars of this framework.

The investment in people and their training is one important part of the sustainability of any system that is put in place - probably even the most important part. In recent years our press is mentioning para-surveyors, grass-root surveyors and even barefoot surveyors – we would avoid the latter term. While these types of surveyors can have their importance in given circumstances - one man surveying is very recent and not suitable for all types of surveys - it is our main task to make sure that the quality of the geodetic and property surveyors is maintained at a high level.

With this contribution CLGE reaches out to FIG - whose foremost goal is to represent the interests of the surveyors worldwide - and its Commissions 1 and 2, to make sure that this topic is promoted with the required emphasis and integrated in the sustainability of all the solutions proposed by FIG.

Finally, we hope that many other countries, in Europe and beyond, will soon sign our Code of Professional Qualifications for Property Surveyors.

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