



EDGE Protocols Glossary

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Creating Markets, Creating Opportunities

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1. About this document

The EDGE Glossary sets out a definition for some of the most commonly used terms in the EDGE Protocols. Terms in the documents are presented in the text using capital letters to indicate they have an official meaning and can be found in the glossary. The definitions below are normative.

The terms below are listed alphabetically.

Readers who are interested in understanding more about voluntary standard systems may be interested in reading the following international standards, for further explanation of the standards system structures and international best practice:

- ISO 9001:2008 – Quality management systems – Requirements
- ISO 17065: 2012 – Conformity assessment – Requirements for bodies certifying products, processes and services
- ISO 17011:2204 – Conformity assessment -- General requirements for accreditation bodies accrediting conformity assessment bodies
- ISEAL Standard-Setting Code – Setting and Social and Environmental Standard v5.0
- ISEAL Assurance Code – Assuring Compliance with Social and Environmental Standards v1.0
- ISEAL Impacts Code – Assessing the Impacts of Social and Environmental Standards v1.0

Annual Audit

IFC's annual review of the data listed in Article 7 of Chapter 2. The EDGE Partner will facilitate this review as well as:

1. visits to the offices and with the staff of the EDGE Partner and any subcontractors
2. checks on the Internal Management System of the Certification Program
3. site visits to certified projects, as selected by IFC
4. interviews with EDGE Clients, Auditors and Interested Parties, as selected by IFC.

The Annual Audit of an EDGE Partner will include a comparison of achievements relative to key performance indicators agreed in the approved Business Plan, if relevant.

Annual Audit Report

The report issued by IFC after an Annual Audit has been completed which details any Non-conformities discovered during the Annual Audit, the timeline within which the Non-conformities must be rectified by Corrective Actions, and the proof of correction required, in order for a Partner to retain its approved status.

Base Case

The average expected efficiency of energy consumption, water consumption and embedded energy in materials for a new building in the current Local Market. The Base Case is calculated by the EDGE Software using the following broad data sets:

1. Climatic conditions of the location.
2. Building type and occupant use.
3. Current construction and consumption patterns in the market.

The Base Case is used as the benchmark for calculating whether or not the EDGE Standard has been achieved.

Business Plan

Partner developed and EO&M Team approved plan for implementing the EDGE Certification Program in a Local Market.

Conflict of Interest

A Conflict of Interest occurs in a situation in which a person has a duty to more than one person or organization, but cannot do justice to the actual or potentially adverse interests of both parties. Within the EDGE Protocols, potential conflicts of interest include approving a Partner or Auditor where the individual making the decision has a personal relationship or other incentive unrelated to the quality of the approval; the same individual(s) undertaking both the audit and the certification decision; Auditors providing consultancy and auditing to the same EDGE Client (which would result in auditing their own design/solution), Partners recommending specific Auditors to EDGE Clients (which could be perceived to be as a result of income generated by increased numbers of EDGE Certificates through weak audits, or could drive the creation of non-ethical incentives for Partners to recommend specific Auditors); and other situations which may arise where there is a lack of independence by a decision-making party.

Corrective Actions

Actions mandated by the EO&M Team in the context of an Annual Audit of a Partner (or a Partner in the context of an EDGE Auditor annual audit) upon the occurrence of Non-conformance(s).

Design Audit

A desk-based review, undertaken by an approved Auditor, of an EDGE Client's Self-Assessment for a registered building project. The Auditor reviews the information input into the EDGE Software against the design, verifying that the information about the planned EDGE Measures has been correctly captured and verifying that there is supporting evidence. The Auditor also verifies that the EDGE Software output meets or exceeds the EDGE Standard, i.e., a minimum improvement of 20 percent relative to the Base Case for each of the Environmental Categories.

Preliminary Certificate

A certificate awarded to recognize the achievement of a Preliminary Certificate, following a Design Audit by an Auditor upon verifying that the information about the planned EDGE Measures has been correctly captured, that there is supporting evidence, and that the EDGE Software output meets or exceeds the EDGE Standard, i.e., a minimum improvement of 20 percent on the Base Case for each of the Environmental Categories.

Dynamic Simulation Model (DSM)

A tool for analyzing the energy performance of a building design which uses design inputs to virtually model thermodynamic energy efficiency profiles, and which may be utilized for purposes of validating the EDGE Software outputs.

EDGE Auditor (also Auditor)

An individual approved by a Partner to undertake Site Audits and Design Audits, and make Recommendations for building projects to receive either a Preliminary Certificate or EDGE Certificate (i.e., post-construction). Individual Auditors may be part of a firm that offers the EDGE auditing services of a number of such approved individuals.

EDGE Branding and Media Guidelines for Partners

Guidelines for the permissible usage of EDGE branding by Partners, as determined by IFC in its sole discretion. The guidelines provide clarity on how Partners can leverage the EDGE brand and assets, gain approval for marketing materials and public relations announcements, and engage with the media in matters related to EDGE.

EDGE Brand Assets

Guidelines for real estate developers to use the EDGE trademark to promote or advertise a property once it has received an EDGE Preliminary Certificate or EDGE Certification, available on-line at <https://www.edgebuildings.com/contact-us/brand-assets/>

EDGE Certificate

A certificate awarded to a completed building project that has achieved the EDGE Standard, verified by an Auditor through a Site Audit, and issued by a Partner, according to the *Certification Protocol*.

EDGE Certification Program (also Certification Program)

An initiative governed by the EDGE Protocols, undertaken by a Partner, Auditors and EDGE Clients, the goal of which is to mainstream green building approaches through the promotion of voluntary green building certification in a prescribed geographic area.

EDGE Certification Fees

EDGE Certification Fees are those fees paid to a Partner in connection with an EDGE Certification application. This may include, without limitation, fees paid at the time of registration of a project and at various subsequent stages in the certification process. These fees do not include fees paid to an EDGE Auditor for auditing services.

EDGE Client (also Client)

An individual or organization that designs and completes a building project directly or through contracting with third parties to meet the EDGE Standard. This would usually be, but is not restricted to, the building owner, investor or developer. The EDGE Client is responsible for preparing a Self-Assessment by selecting the EDGE Measures that best reflect the building components and features of the building as designed or as built, and commissioning an Auditor to undertake a Design Audit and Site Audit. EDGE Clients also provide supporting information and documentation in support of the application for verification by the nominated Auditor.

EDGE Experts

The purpose of the EDGE Expert is to improve EDGE Clients' understanding of green design principles, the EDGE Standard, Software, and Certification System and to facilitate Clients' EDGE applications if they need assistance.

EDGE Expert Participation Agreement

The agreement that every EDGE Expert must sign after successfully passing the EDGE Exam and before beginning to act as an EDGE Expert.

EDGE Exam

The written exam that both EDGE Auditors and Experts must sit and pass.

EDGE Fees

The revenues earned by a Partner related to its EDGE Certification Program, including but not limited to EDGE Certification Fees and revenues from training. A portion of EDGE Fees is shared with IFC, as may be defined in a legal agreement between IFC and a Partner.

EDGE ID Code

A unique reference assigned to an active project, at the point where the building project is saved within the EDGE Software. Issued by the EO&M Team or through the EDGE Software, the EDGE ID Code shall be used in all queries, invoicing and communications related to the project.

EDGE Platform (also IT Platform)

The web-based information technology system, including servers and associated software, on which the EDGE Software is intended to operate, as determined by IFC in its sole discretion.

EDGE Protocols

The standards, systems, documents, procedures and policies which govern the operation and management of all organizations involved in delivering EDGE Certification Programs around the world, including the activities of the EO&M Team, the Local Partners, Global Partners, Auditors, EDGE Clients, Interested Parties and others involved in implementing EDGE Certification Programs.

EDGE Measures

The EDGE Measures are the list of best-practice options or building features which have a measurable influence on the modelled energy or water used during the operation of the building or the embodied energy of the materials used to construct the building. The calculation of the improved case is based on the EDGE Measures available in the appropriate version of the EDGE Software that have been claimed by an EDGE Client and any specific performance data provided by the EDGE Client.

EDGE Project Database

A centrally maintained database which contains the details of all registered EDGE building projects globally. It is maintained by the EO&M Team, and populated with information from EDGE Clients and Partners.

EDGE Software

An online building design and self-assessment tool that benchmarks designs against a low-cost universal green standard for emerging market countries. In the EDGE Protocols, the EDGE Software is used by the EDGE Client to undertake a Self-Assessment of their building project design, a pre-cursor to EDGE Certification. More widely, the platform is intended for anyone who is interested in the design or specification of an EDGE green building, including, but not limited to; architects, engineers, developers, building owners, policy makers, governmental and financial institutions.

EDGE Standard

A minimum 20 percent predicted reduction in energy consumption, water consumption and embedded energy in materials (the three Environmental Categories) relative to prevailing local practices as represented by the agreed Base Case model for a locality.

Environmental Categories

The categories of energy consumption, water consumption and embedded energy in materials for which there must be a 20 percent reduction relative to the performance of the Base Case for purposes of satisfying the EDGE Standard.

EO&M Team

The team responsible for central administration and oversight of the EDGE Protocols, including maintaining the EDGE Protocols, the EDGE Software, approving Local Partners and Global Partners, undertaking quality assurance oversight of Partners, developing global training materials and generally supporting the implementation of EDGE Certification Programs around the world.

Global Clients

Clients proposing a series of projects for Certification in two or more Local Markets (at least one of which is not currently served by an approved Local Partner) who elect to work with a Global Partner on these Certifications.

Global Partner

The organization with responsibility for providing EDGE Certification in one or more Local Markets, through provision of auditing and certification services. Global Partner only operates in Local Markets where there is no Local Partner, and their role is to provide services to EDGE Clients on a demand-driven basis. They are not required to prepare a market appraisal or a Business Plan, and have no targets for market penetration. The Global Partner signs a legal agreement with IFC that sets out their responsibilities.

Interested Parties

Individuals or organisations who have an interest in delivering more sustainable buildings in emerging economies and that have a specific interest in the EDGE Certification Program, either in the Local Markets or globally; and/or stakeholders, that is individuals or organizations that are affected by the operation or results of the EDGE Certification Program. Interested Parties include but are not limited to the following groups:

- EDGE entities such as Clients, EDGE Experts, Auditors, Third Party Certifying Bodies, Partners, Strategic Supporters, and subcontractors to Partners;
- Architects;
- Engineers;
- Developers;
- Building owners;
- Policy makers;
- Governmental organizations;
- Non-Governmental organizations
- Financial institutions;
- Construction industry supply chain;
- Utilities

Internal Management System

A system maintained by each Partner for the administration, management, and maintenance of an EDGE Certification Program, including measures to control the required documentation and records related to auditing and certification pursuant to the EDGE Protocols, as well as to institute its processes, determine the process interaction, resources required to maintain such processes, and how they can be measured and enhanced.

Local Adaptation

A process through which the EDGE Software is adapted to align more closely with local standards and practices, by replacing the global technical data points with data points that are specific to the Local Market, enabling more accurate calculation of the expected savings within the Environmental Categories. The work is led by an expert, with input from Interested Parties. After a Local Adaptation is complete, the global EDGE Software is no longer applicable in that particular Local Market.

Local Market

A defined geographic location which is a city, sub-national area, or country; within which there is an EDGE Certification Program being developed or operated. The Local Market scope is new builds, and may be limited to specific building types. In the case of a Local Partner, the market appraisal and Business Plan are based on a defined Local Market.

Local Partner

The organization with responsibility for developing and implementing an EDGE Certification Program in a specific Local Market. Their role is to drive transformation of the Local Market, and they are required to prepare a market appraisal and a Business Plan, and have targets for market penetration. The Local Partner signs a legal agreement with IFC that sets out their responsibilities. A Local Partner may choose to work with Third Party Certifying Bodies, other partners, third parties or contractors to fulfil the EDGE Protocols' requirements, though remains responsible for ensuring the operation of the EDGE Certification Program is consistent with the EDGE Protocols requirements.

Non-conformance (also Non-conformities)

A failure to meet a normative requirement of the EDGE Protocols, identified during an audit. This includes the Annual Audit of Local Partners and Global Partners undertaken by the EO&M Team and the annual sample of EDGE Auditors undertaken by the relevant Partner. There are two levels of non-conformance: minor non-conformities are single observed lapses that are not indicative of a system failure, and typically can be dealt with quickly without major changes to procedures or punitive measures; a major non-conformance is a systematic failure or absence of a system, long-standing minor non-conformance from previous assessments, or a collection of similar minor non-conformances indicating a widespread problem, and may result in the temporary or permanent suspension of the approved status of a Local Partner, Global Partner or EDGE Auditor.

Partners (or EDGE Partners)

Refers collectively to both Local Partners and Global Partners (see definitions).

Practically Complete

A building is considered practically complete at the earliest of the following dates: (a) the date the building is occupied; (b) the date an occupancy permit is issued; (c) the date the contractor hands the building over to the owner.

Recommendation

Report written by the Auditor stating whether or not the EDGE Client's building project meets the EDGE Standard. A Recommendation is made both at the Design Audit stage and the Site Audit stage. The Auditor is not responsible for issuing the final EDGE Certificate. The EDGE Certificate is issued by the relevant Partner or Third Party Certifying Body after a positive review of a Recommendation following a Site Audit.

Self-Assessment

The assessment of a building undertaken by the design team or building owner before being submitted for audit. The Self-Assessment shall be completed using the EDGE Software, and shall include location/address, contact details, usage data and basic building geometry as required by the EDGE Software. Each efficiency measure selected in the EDGE Software must be supported by documentation, as described in the User Guide. A Self-Assessment can be undertaken at the design stage and/or post construction.

Site Audit

A field-based review, undertaken by an Auditor, of an EDGE Client's completed building project. The Auditor verifies that the completed building project has incorporated the EDGE Measures necessary to attain the EDGE Standard.

Strategic Supporter

An Interested Party that may play a formal or informal role in the implementation of a Business Plan in collaboration with a Local Partner. A Strategic Supporter's role is centred upon socializing the EDGE Certification benefits and approach with potential Clients and lobbying public and private sector entities for their support.

Third Party Certifying Body

An entity contracted by a Local Partner to execute all or part of the services related to the certification process that are the responsibility of the Local Partner. The Third Party Certifying Body will be part of the due diligence process required to approve a Local Partner and a change in Third Party Certifying Body may only be made with IFC's

consent. The quality of service delivery of the Third Party Certifying Body is the responsibility of the Local Partner and the Local Partner may lose approval to operate in its Local Market if the Third Party Certifying Body fails to cure identified quality issues. Furthermore, the Local Partner and the Third Party Certifying Body must grant IFC free access to all relevant staff and records for the purpose of quality controls at any time.

User Guide

Documents which describe the detailed requirements for completing a Self-Assessment and the supporting technical information required for an Auditor to judge whether a Recommendation for EDGE Certification should be made. The User Guide also includes basic descriptions of each measure providing readers with definitions and examples of technology available.