WORLD GREEN BUILDING COUNCIL
Americas

# Building the Transition: Transforming Buildings and Construction in Latin America

## Part 1: Mapping the Landscape

**Stakeholder perspectives on opportunities and challenges in developing national climate action roadmaps**

Countries covered:
Ecuador, El Salvador, Guatemala, Mexico, Panama, Paraguay and Venezuela

July 2025

# About WorldGBC

The World Green Building Council (WorldGBC) is the largest and most influential global action network accelerating the sustainable and just transformation of the built environment.

We represent a global community of over 75 Green Building Councils (GBCs) and 47,000 members. Together, we drive local action and create the global momentum needed for all people and the planet to thrive.

**75+**
**Green Building Councils**

**47,000**
**members around the world**

## Our Vision

Resilient and decarbonised buildings for a healthy planet and a better future for all.

## Our Mission

To inspire and lead the built environment community to drive local action and generate the global momentum needed for people and planet to thrive.

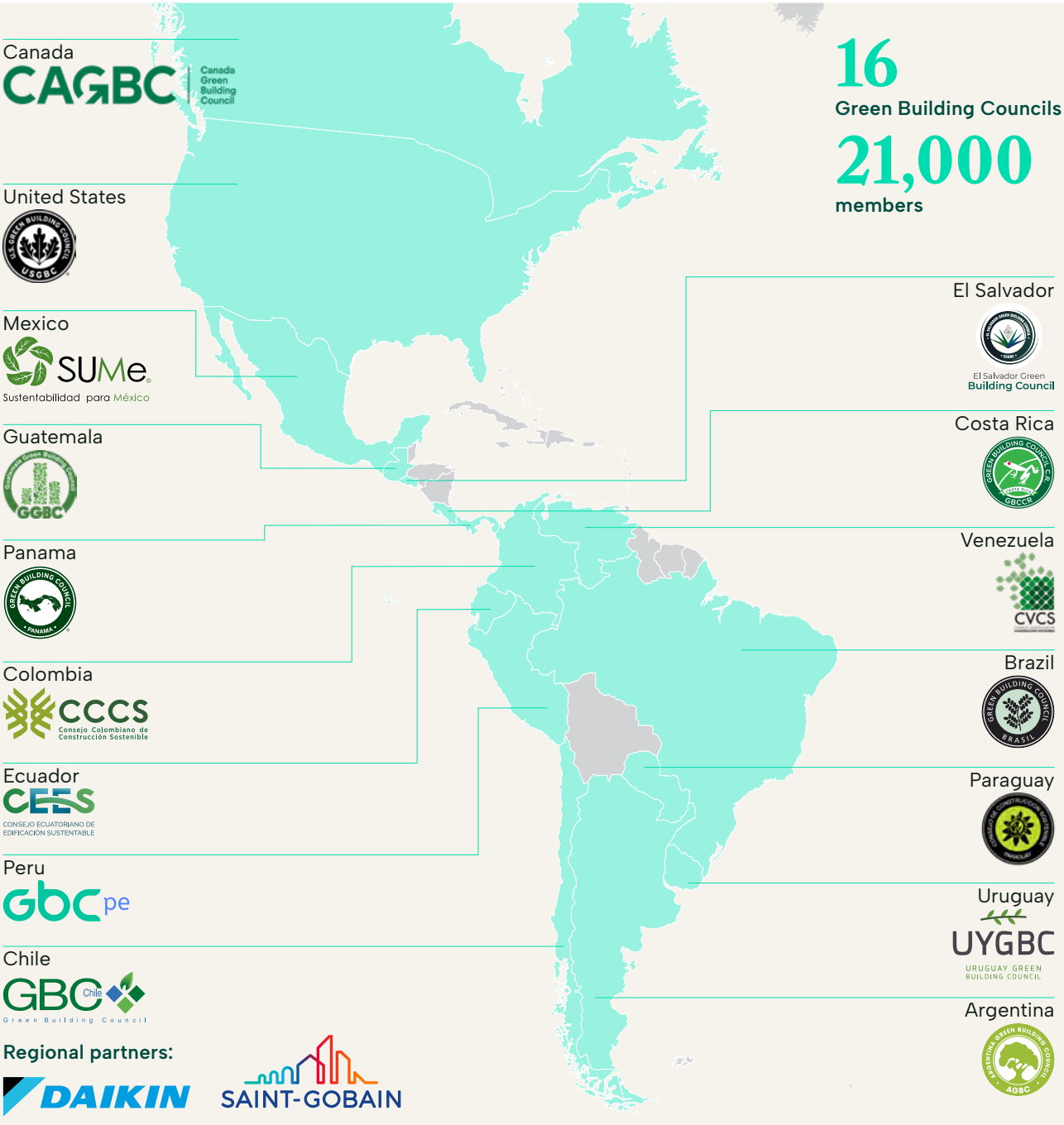
Learn more: www.worldgbc.org

# About WorldGBC's Americas Regional Network

## The buildings and construction sector in Latin America and the Caribbean is a key driver of economic growth, urban development and climate resilience.

According to the GlobalABC and International Energy Agency (IEA), the sector represents a business opportunity worth approximately USD 4.1 trillion by 2030.

The Americas Regional Network (ARN) of WorldGBC drives action to shape a decarbonised, resilient and healthy built environment across the region. The ARN includes 16 Green Building Councils — 14 in Latin America and 2 in North America — with 21,000 members and two regional partners. Together, they collaborate to deliver a holistic sustainability vision and advance the agenda for a more sustainable built environment.



The ARN supports the goals of the Paris Agreement, aiming to:

- limit global warming to well below 2°C and pursue efforts to limit it to 1.5°C above pre-industrial levels
- transform the built environment to achieve net-zero carbon emissions
- double the rate of energy efficiency improvements in the sector by 2030

To achieve these goals, the ARN is working with stakeholders across the building and construction value chain to design and implement enabling actions, and to support the development and strengthening of Nationally Determined Contributions (NDCs) that position the built environment as a strategic climate solution.

Currently, WorldGBC and its national GBCs are collaborating with governments in Ecuador, El Salvador, Guatemala, Mexico, Panama, Paraguay and Venezuela to develop national climate action roadmaps using the Zero Carbon and Climate Resilience Readiness Framework. Additionally, we are supporting Brazil, Colombia, Costa Rica, Ecuador and Chile in updating their NDCs using the WorldGBC NDC Scorecard for Sustainable Buildings. This tool enables policymakers and other stakeholders to evaluate and compare their country's NDCs, identify gaps and raise ambition in line with the 1.5°C pathway.

Together with our GBCs and regional partners, these efforts are driving transformation in more than 74 percent of the buildings and construction market in Latin America.

## Authors

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## Acknowledgements

WorldGBC gratefully acknowledges the leadership and commitment of our Green Building Councils in:

Ecuador (CEES), El Salvador (ESGBC), Guatemala (GGBC), Mexico (SUMe), Panama (PanamaGBC), Paraguay (PYGBC), and Venezuela (CVCS) for their contributions to the execution of this project.

We also recognise and thank Chile (ChileGBC) and Colombia (CCCS) for their valuable input in reviewing the project methodology.

**The Americas Regional Network and the Zero Carbon and Climate Resilience Readiness Framework are generously supported by our Regional Partners:**

'Across Latin America, the urgency to build climate-resilient, low-carbon cities is greater than ever. The Zero Carbon and Climate Resilience Readiness Framework (the Readiness Framework) offers a structured pathway to transform this urgency into coordinated, tangible action. By engaging stakeholders at every level — from policymakers to industry innovators — it helps unlock the systemic changes needed to decarbonise the built environment and foster long-term resilience.

At Daikin, we see this as a key opportunity to support the region's transition to a low-carbon built environment, one that is inclusive, forward-looking and grounded in local realities. We are deeply committed to advancing the Sustainable Development Goals through innovation and collaboration. Supporting the WorldGBC's regional framework reflects our belief that energy-efficient and low-GWP technologies must be both accessible and aligned with national climate ambitions.

Together, we are building a future where sustainability is embedded in every step of the construction value chain, transforming cities into healthier, more liveable places for generations to come.'

**Kota Fukutoku**
**Vice President, Daikin Latin America Division**

'The Zero Carbon and Climate Resilience Readiness Framework (the Readiness Framework) serves as a pivotal tool for mobilising collective efforts across the Americas, uniting governments, industries and communities in a shared commitment to decarbonisation and climate resilience.

By identifying key opportunities and challenges, we empower stakeholders to develop actionable roadmaps that not only enhance the sustainability of our built environment but also promote a holistic approach to climate mitigation and adaptation. This initiative aligns seamlessly with Saint-Gobain's commitment to achieve our 2050 sustainability goals, as we actively work to reduce our environmental impact through our operations.

The shared vision between the World Green Building Council and Saint-Gobain inspires a collaborative effort towards a more sustainable future, ensuring that our actions today contribute to a resilient and thriving planet for generations to come.'

**Marco Corrales**
**CEO, Saint-Gobain LATAM North**

"This report is a testament to the power of regional collaboration. Through the Zero Carbon and Climate Resilience Readiness Framework, stakeholders across Latin America are aligning around a shared vision for sustainable buildings — co-creating national pathways that reflect local realities while driving collective progress toward a resilient, zero-carbon future."

**Cristina Gamboa**
**CEO, World Green Building Council**

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# Executive summary

**The Zero Carbon and Climate Resilience Readiness Framework (Readiness Framework), led by the World Green Building Council (WorldGBC), is a strategic initiative to accelerate the transition to a decarbonised and climate resilient built environment.**

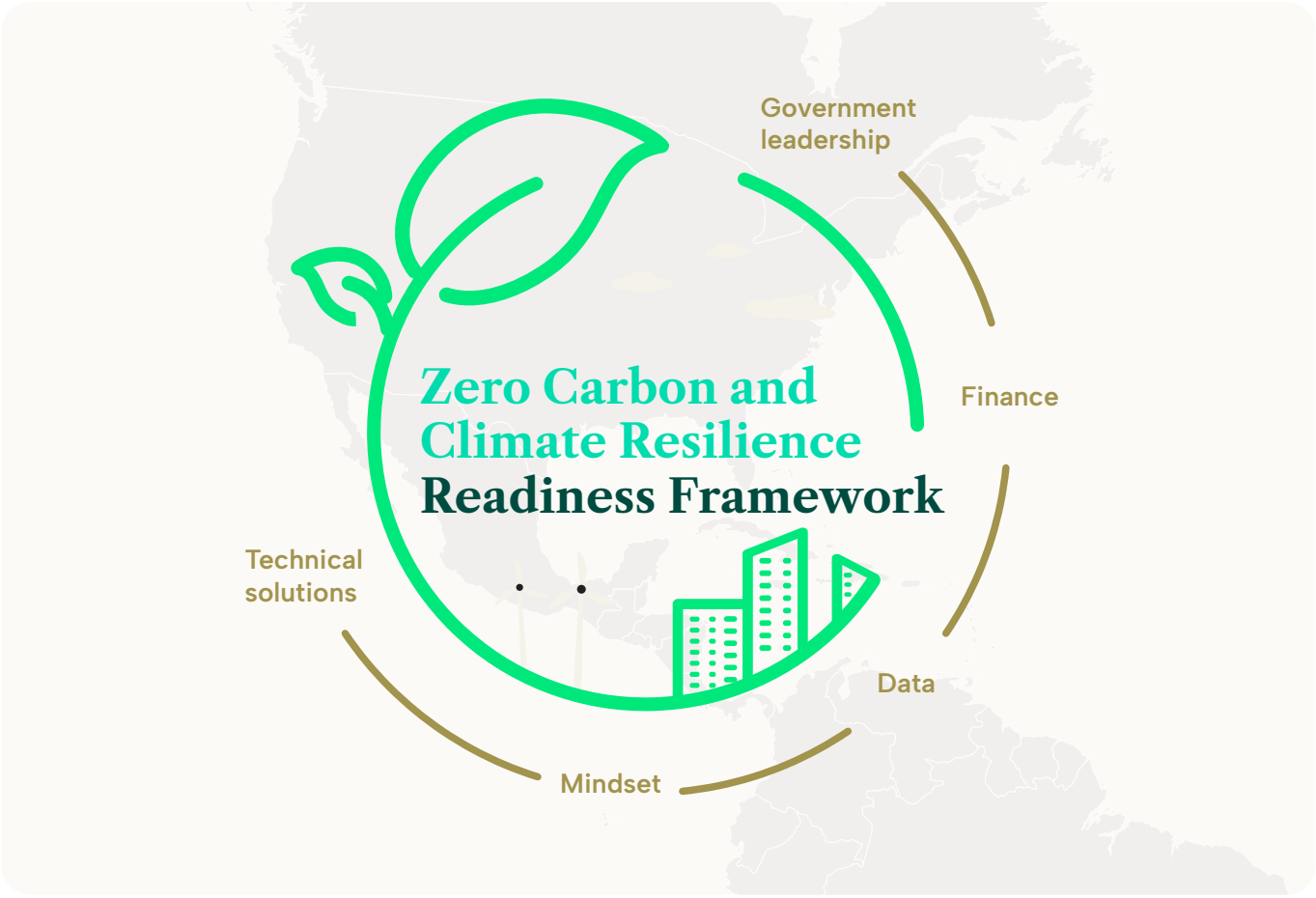
First pioneered by the Asia-Pacific Regional Network, the Readiness Framework has been further developed by the Americas Reginal Network (ARN) in partnership with 7 GBCs and over 420 stakeholders across Latin America. It is now being rolled out across WorldGBC's other regions. The Framework evaluates current market conditions, identifies key opportunities and challenges, and lays the groundwork for developing national roadmaps for sustainable buildings and construction.

The Framework focuses on five strategic pillars: government leadership, technical solutions, finance, data and mindset. Each pillar was evaluated through a regional survey and multi-stakeholder engagement to assess the perceived importance and feasibility of implementation. The results guide the design of national decarbonisation and climate resilience roadmaps.

Roadmaps are strategic tools that define clear, time-bound actions for key stakeholders across the building and construction value chain. They mobilise public and private actors, inform policy development, and support progress tracking through defined indicators. When grounded in local context and supported by expert insight and data, roadmaps help unlock the systemic change required for climate action in the built environment.

**7**
**National Green Building Councils**

**420+**
**Stakeholders**



## Key findings

Key findings from the seven participating countries — Ecuador, El Salvador, Guatemala, Mexico, Panama, Paraguay and Venezuela — include:

### Government leadership

While some countries have introduced policies on energy efficiency and decarbonisation, alignment with zero-carbon certification schemes and integration into Nationally Determined Contributions (NDCs) remains limited. Major implementation gaps persist.

### Technical solutions

Stakeholders identified technologies such as low-carbon materials, high-efficiency HVAC systems and building management systems (BMS) as critical. However, their accessibility and affordability vary significantly across national markets.

### Finance

More than 68% of respondents reported a lack of financial products and incentives to drive sustainable construction. This represents a major barrier — but also a high-impact opportunity for policy reform and market innovation.

### Data

Over 75% of stakeholders cited limited availability of baseline data, which hinders roadmap development, target-setting and progress monitoring.

### Mindset

Shifting societal and industry perceptions emerged as both a top priority and a feasible area for progress. Key levers include capacity building, transparent governance and cross-sector collaboration.

The report also identifies clear pathways forward: scaling digital solutions (e.g. BIM and BMS), expanding access to renewable energy, and establishing national working groups to coordinate action.

Although challenges remain, especially in finance, data systems and capacity building, the findings signal strong regional momentum. The next phase of the Readiness Framework will convene national workshops to validate strategies, define enabling actions, and produce tailored, actionable roadmaps with clear roles, timelines and performance indicators.

**68%**

**of respondents reported a lack of financial products and incentives to drive sustainable construction**

**75%**

**of stakeholders cited limited availability of baseline data**

# Introduction

## At the World Green Building Council (WorldGBC), our mission is to enable property and construction markets worldwide to achieve, by 2050:

A fully decarbonised built environment

Healthy, equitable and resilient buildings, cities and communities

The regeneration of natural systems and a thriving circular economy

Achieving these goals requires a fundamental shift in policy, finance, social and cultural frameworks — and WorldGBC is uniquely positioned to drive that change.

Our global network connects governments, businesses, finance, and communities, aligning local action with global ambition. We work to:

- align ambition, definitions, and actions across markets
- partner with stakeholders to co-create solutions
- scale advocacy, projects and knowledge that accelerate impact

As part of our 2025–2027 global strategy, the flagship programme Building the Transition supports national action through three key areas:

- co-developing national decarbonisation and resilience roadmaps
- strengthening global and regional advocacy
- advancing policies, standards and codes that support transformation

Recognising the diversity of regional markets, WorldGBC uses a stepped approach to roadmap creation. The Zero Carbon and Climate Resilience Readiness Framework is the first step. It aligns stakeholders, assesses current conditions, and supports Green Building Councils (GBCs) in developing country-specific roadmaps through broad value chain engagement.

One strong example is the Colombia Green Building Council (CCCS) and its National Roadmap for Net Zero Carbon Buildings, developed in 2022 with over 380 national stakeholders. The roadmap, complemented by city-level action plans for Bogotá and Cali, outlines ambitious targets for operational and embodied carbon reductions through 2040 — with full decarbonisation by 2050. It has become a core tool in Colombia's climate strategy, guiding action across the public and private sectors.

The Readiness Framework focuses on five pillars — government leadership, technical solutions, finance, data and mindset — and engages a wide spectrum of stakeholders across the built environment.

By applying the Framework, we can assess national market readiness, identify strategic gaps and opportunities, and define the enabling actions required to meet 2050 climate targets. Roadmaps are proven tools to focus ambition, guide investment and scale action and they are central to driving systemic change in the building and construction sector across Latin America.

## Latin America Zero Carbon and Climate Resilience Readiness Framework

Coordinated by WorldGBC's Americas Regional Network (ARN) and implemented by national Green Building Councils (GBCs), this initiative supports governments and industry in aligning building-sector climate action with Nationally Determined Contributions (NDCs), national policies and long-term strategies.

The Readiness Framework is being delivered in two phases:

1. Map current conditions through a regional stakeholder survey. Identify key opportunities and barriers. The results are analysed in this report (*Part 1: Mapping the Landscape*).
2. Facilitate national, multi-sectoral dialogues to co-design enabling actions, targets and indicators. Results will be covered in a follow-up report (*Part 2*).

Insights from both phases will inform tailored strategies to strengthen market readiness, unlock finance, and support ambitious public policy. Together, these actions aim to accelerate the development of a resilient, zero-carbon built environment across Latin America.

## Methodology

The original Zero Carbon Readiness Framework was developed in 2021 by WorldGBC's Asia Pacific Network (APN) to support the building and construction sector in achieving net zero emissions by 2050.

In 2023, at COP28, WorldGBC joined the launch of the Buildings Breakthrough, a global platform aimed at making near-zero emissions and resilient buildings the norm by 2030. This was followed in March 2024 by the Buildings and Climate Global Forum (BCGF) in Paris, where 70 countries endorsed the Chaillot Declaration. During the forum, the GlobalABC launched the Roadmap Action Framework as part of their Global Status Report 2023, accelerating efforts to decarbonise and adapt the built environment.

Building on APN's groundwork and these global commitments, WorldGBC's Americas Regional Network (ARN) updated the Framework to include energy efficiency and climate resilience, in addition to operational and embodied carbon, across all five pillars.

Following a regional consultation, the ARN designed a survey to assess market readiness. The survey included:

- a brief overview of definitions and terminology
- a respondent profile section to capture market data
- five thematic sections (one per pillar) assessing 28 strategies, each rated from 1 (low) to 5 (high) for importance and likelihood
- a final open-ended section to gather qualitative insights

The survey was distributed by national GBCs to stakeholders across their networks, ensuring broad participation across the construction value chain. Responses were analysed to identify trends, barriers, and enablers, and to define the key actions needed to support national roadmaps.

Findings from each country were consolidated and evaluated to generate the regional analysis presented in this report.

## Participant GBCs and stakeholders

Seven national Green Building Councils (GBCs) participated in this initiative:

CEES (Ecuador), ESGBC (El Salvador), GGBC (Guatemala), SUMe (Mexico), PanamaGBC (Panama), PYGBC(Paraguay), and CVCS (Venezuela).

Together, these GBCs engaged more than 420 stakeholders from across their national construction value chains. Their involvement reflects strong regional leadership in the development, implementation and monitoring of decarbonisation and climate resilience roadmaps.

The survey captured the perspectives of stakeholders from across sectors. Figure 1 shows the percentage distribution of survey respondents by sector, with the private sector representing the majority.

- 63% private sector
- 15% academia
- 12% public sector
- 10% non-profits, financial institutions and others

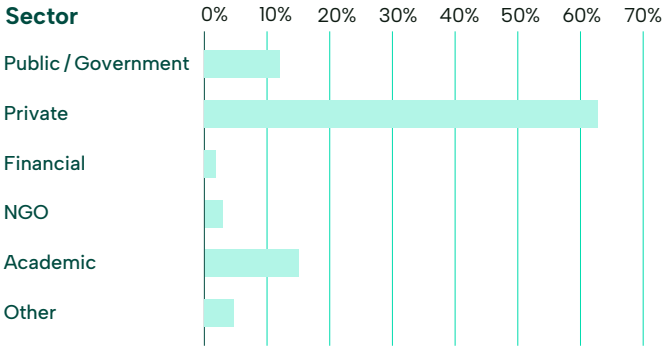



**Fig. 1. Sectoral representation of survey respondents.**

The active participation of GBCs and national stakeholders was essential for identifying enabling actions to advance national roadmaps. These actions will inform a regional matrix of priorities, including strategies, targets and indicators.

This matrix will be published on the Latin America Zero Carbon and Climate Resilience Readiness Framework webpage, and will serve as a reference for the building and construction sector across the region.

# Survey key findings

This section presents the regional trends and insights collected through the Readiness Framework survey, which assessed market readiness across five strategic pillars: government leadership, technical solutions, finance, data, and mindset. The findings reflect input from over 420 stakeholders across seven Latin American countries, identifying perceived priorities, challenges, and opportunities in the path to sustainable and resilient buildings.

## Regional market opinion on government leadership

Survey respondents were asked which policy principles they considered most relevant for advancing a decarbonised and resilient built environment in their country. Figure 2 shows the regional prioritisation of these policy principles. The top three responses across the seven participating countries were:

- water management
- biodiversity
- carbon emissions

These principles reflect regional concerns about water management, biodiversity loss and emissions mitigation in the face of climate-related risks.

**Ranking policy principles**

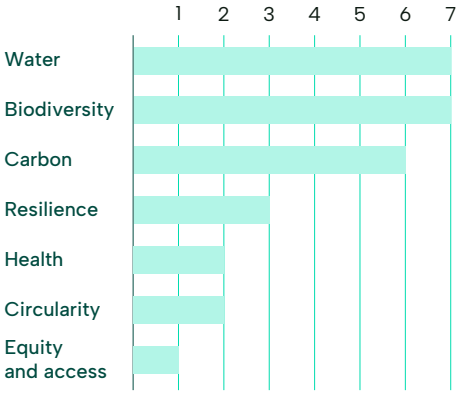



Fig. 2. Regional market opinion on the relevance of the Policy Principles.

When asked which existing public policies or instruments in their country support decarbonisation and resilience in the built environment, respondents identified a range of local and international certification schemes. However, the responses varied significantly by country, with some reporting limited or outdated policies. Figure 3 illustrates the distribution of responses across the region.

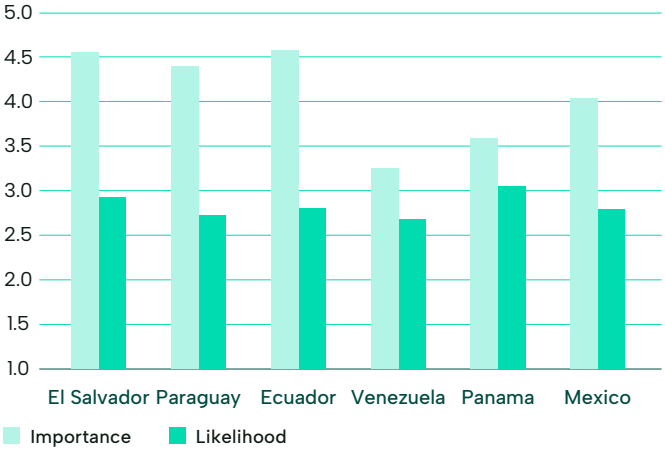



Fig. 3. Existing public policies or instruments that support decarbonisation and resilience in the built environment (regional overview).

Respondents were also asked to evaluate their national governments' level of leadership and coordination in driving action on zero-carbon and resilient buildings. Across all countries, there was a clear signal that government leadership is perceived as insufficient. Figure 4 presents the regional view of government leadership and coordination.

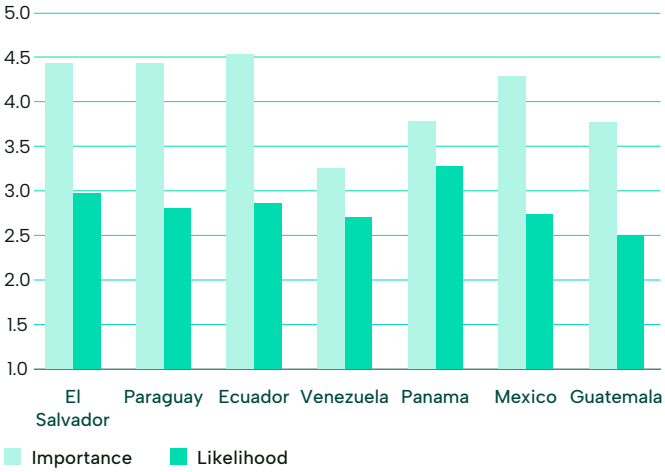



Fig. 4. Regional view on government leadership and coordination for zero-carbon and resilient buildings.

These findings point to a clear gap in policy alignment and ambition. While some national governments have introduced energy efficiency strategies or building codes, most are not yet aligned with zero-carbon certification frameworks, nor do they include ambitious targets for the sector in their Nationally Determined Contributions (NDCs).

## Relevant technologies for decarbonisation and resilience strategies in buildings

Respondents were asked to identify the most relevant technologies to support decarbonisation in their national building sectors. The survey focused on energy efficiency technologies considered essential to advance each country's climate goals.

Figure 5 presents the regional overview of the most commonly cited strategies, which are widely regarded as foundational to achieving a decarbonised and resilient built environment. The top responses were:

- low-carbon materials (18.9% of total responses)
- metering, automation and control systems (18.1%)
- highly efficient heating, ventilation and air conditioning (HVAC) systems (17.1%)

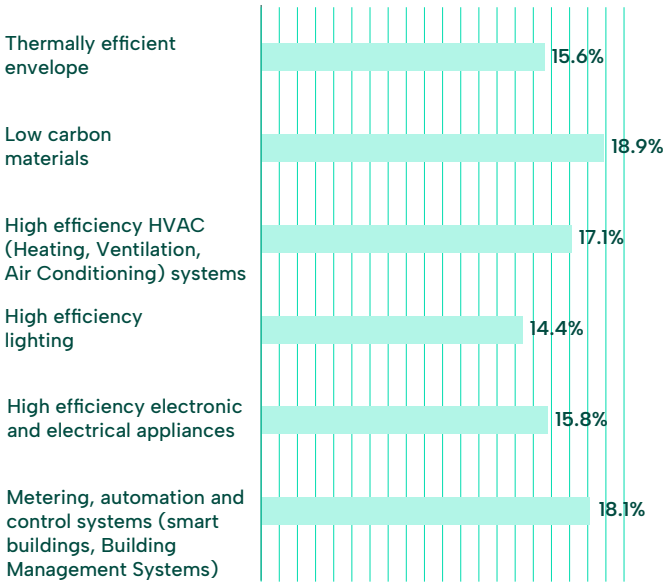



Fig. 5. Regional market opinion on the relevance of energy efficiency and decarbonisation strategies.

While these priorities were broadly shared across countries, national context, such as climate, local building practices, and market conditions, influenced how strategies were ranked. Some countries emphasised the importance of efficient HVAC systems or thermally efficient building envelopes, while others prioritised digital automation tools. Figure 6 illustrates these country-level differences in strategic focus.

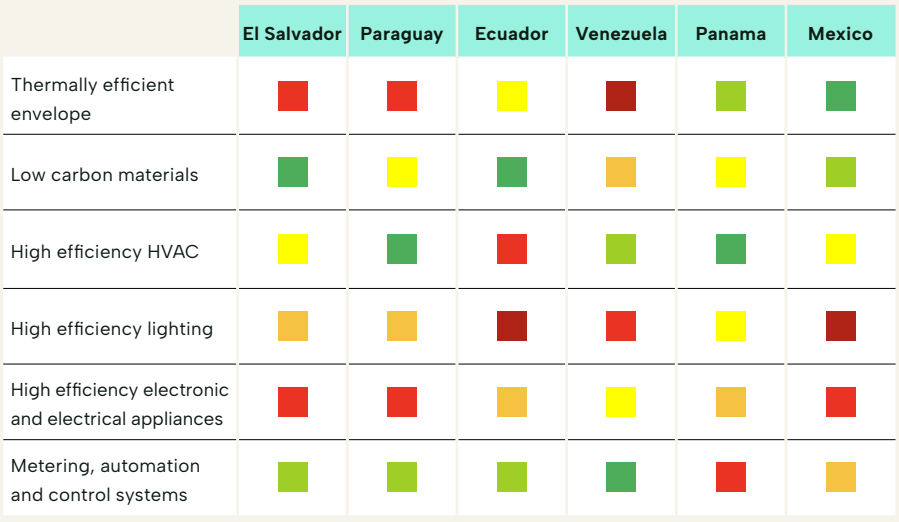



Fig. 6. Regional opinion on the relevance of energy efficiency and decarbonisation strategies by country.

In terms of technology access in South America, over 60 percent of respondents from Ecuador, Paraguay, and Venezuela reported that technologies to improve energy efficiency across the building lifecycle are neither widely available nor affordable. This lack of access presents a significant barrier to implementation.

In contrast, stakeholders in Central America, specifically from El Salvador, Mexico, and Panama, reported better availability and affordability. Figure 7 summarises these findings, highlighting a key opportunity for regional collaboration to accelerate decarbonisation efforts.

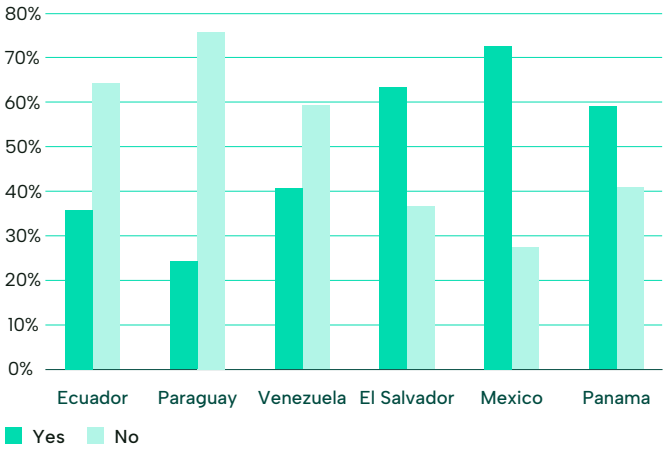



Fig. 7. Regional market opinion on whether or not technology is currently available and affordable locally to increase energy efficiency throughout the building lifecycle.

On the topic of climate resilience, most respondents from Ecuador, Paraguay, Venezuela, El Salvador, and Panama cited limited local knowledge and a lack of accessible and affordable tools and technologies. These gaps present a major challenge for implementing resilience strategies in buildings.

In contrast, respondents from Mexico and Guatemala reported a more favourable context, with greater awareness and access to necessary tools. This suggests an opportunity to develop integrated national roadmaps that address both mitigation and adaptation strategies. These findings are shown in Figure 8.

These findings suggest that although there is broad consensus on key technologies, their availability and suitability depend on country-specific conditions. Tailored strategies will be needed to align these technologies with national roadmaps for decarbonisation and resilience.

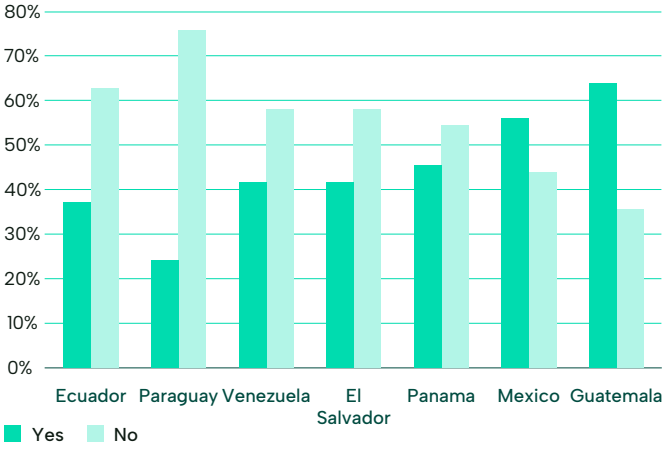



Fig. 8. Regional market opinion on whether or not the knowledge, availability, and affordability of tools and technologies are sufficient to enhance the climate resilience of buildings.

## Key opportunities and challenges for regional sustainable finance

Finance is a key enabler and promoter of green buildings and a sustainable built environment. However, when asked 'In your opinion, do you consider that in your country there are financial products and incentives to adopt energy efficiency in the construction sector?' over 68% of the overall respondents answered that there is a lack of such financial mechanisms, as shown in Figure 9.

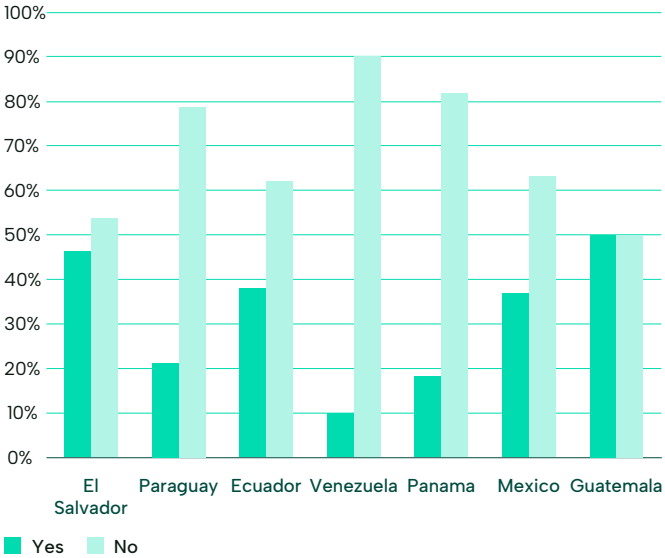



Fig. 9. Regional market opinion on whether or not financial products and incentives are available to drive sustainable construction.

This presents a significant challenge, but also a clear opportunity. As discussed in the section on 'Opportunities and challenges', which examines the gaps (challenges) and enabling actions (opportunities), financing is identified as the most critical barrier to progress.

To address this, financial institutions, in collaboration with local governments, could consider the following:

- establishing financial models that include fiscal and non-fiscal incentives for zero-carbon and resilient construction projects
- linking energy efficiency, zero carbon, and building resilience with environmental, social, and governance (ESG) reporting frameworks and disclosure standards

These measures would support the scaling of sustainable construction practices and strengthen climate-aligned investment flows across the region.

## The importance of data for baselines and roadmaps development

Access to reliable data is essential for defining baselines on energy efficiency, carbon emissions, and resilience. These baselines are critical for setting meaningful targets in national roadmaps.

Across the surveyed countries, between 66% and 89% of respondents reported that there is limited availability of data to assess the current performance of public and private buildings, as shown in Figure 10.

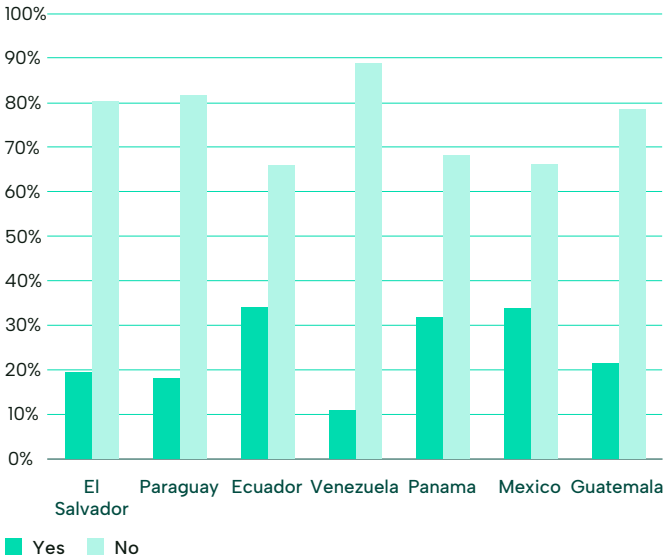



Fig. 10. Regional market opinion on whether or not sufficient data is available to define carbon and resilience baselines.

This represents a major challenge for understanding market conditions. However, it also opens an opportunity to design and adopt methodologies aligned with national and international standards. Moreover, it underscores the potential to leverage digital solutions for:

- measurement
- monitoring
- control and automation of buildings

These technologies, such as Building Information Modelling (BIM), data platforms, and advanced analytics, were consistently identified through this project as key enablers of energy efficiency and decarbonisation.

## Key aspects for community resilience and mindset shift

People and communities are essential stakeholders throughout the building lifecycle. Their wellbeing and quality of life can be significantly affected by decisions made during early planning and design stages.

The survey explored four key areas:

- relevant climate and non-climate risks
- enablers of a mindset shift
- social impact priorities
- factors influencing decision-making in early project stages

Climate risks were identified as particularly important for shaping resilience strategies, shown in Figure 11 below.

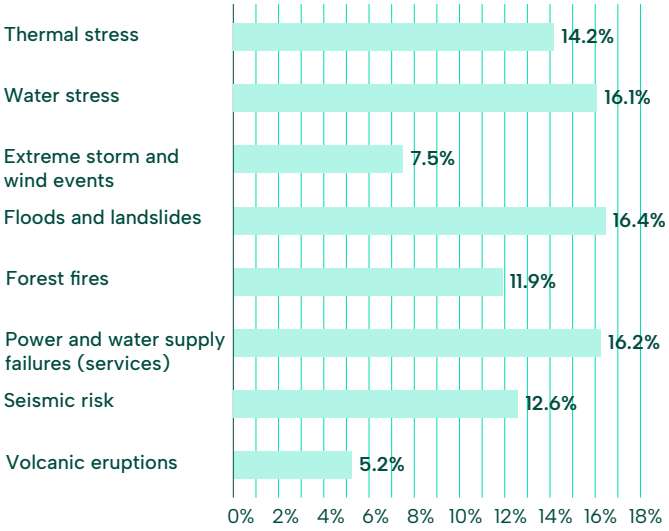



Fig. 11. Regional market opinion on the most relevant climate and non-climate risks (percentages reflect the share of total responses).

Regionally, the most pressing risks were:

- floods and landslides (16.4%)
- power and water supply failures (16.2%)
- water stress (16.1%)

These issues are closely tied to water management, which was also identified as the most important WorldGBC Global Policy Principle in the region (see Section 'Regional market opinion on government leadership').

Changing public and industry mindsets is fundamental to accelerating the shift to sustainable, resilient buildings. As shown in Figure 12, Respondents identified three key enablers of a mindset shift:

- user and community training (19.3%)
- governance transparency and accountability (17.1%)
- inter-sectoral coordination and stakeholder engagement strategies (16.4%)

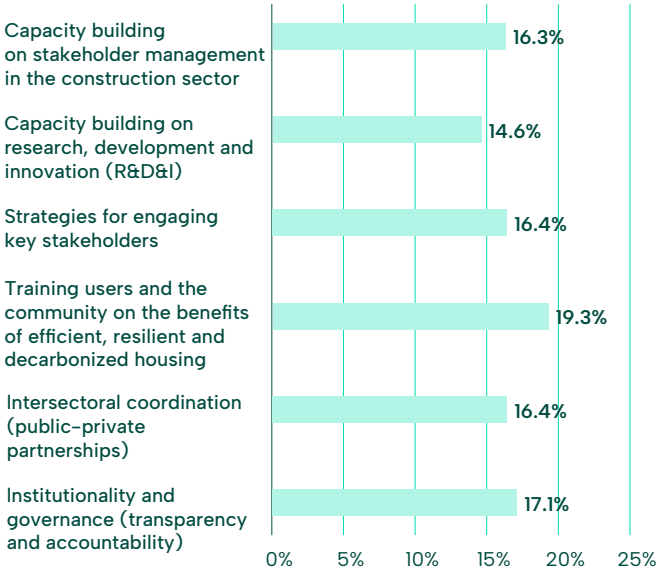



Fig. 12. Regional market opinion on aspects for promoting mindset shift (percentages reflect the share of total responses).

The WorldGBC's report *Social Impact across the Built Environment* (2023) highlights how the sector influences human rights across its lifecycle. The survey confirmed this, as shown in Figure 13, with regional respondents identifying the following social impact priorities:

- ensuring health, comfort, and safety (21.1%)
- addressing social risk factors and climate impacts (17.5%)
- promoting universal accessibility and connectivity (14.8%)

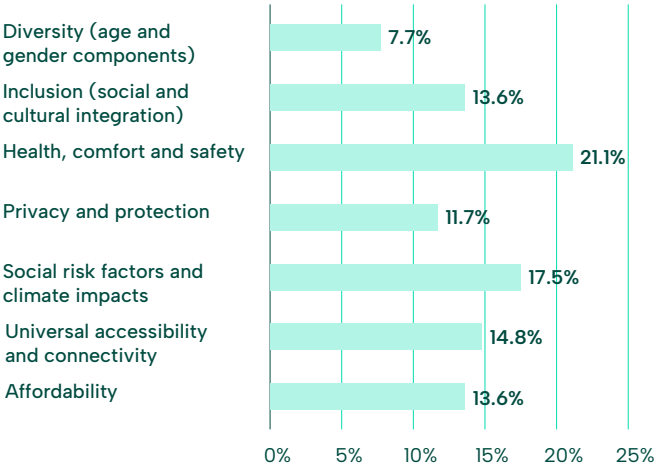



Fig. 13. Regional market opinion on the relevance of social impact issues through the building lifecycle (percentages reflect the share of total responses).

Finally, respondents were asked about the most important early-stage decision-making factors in the building lifecycle. As shown in Figure 14, top priorities were:

- liveability and thermal comfort (21.2%)
- climate risk factors (17%)
- accessibility (15.5%)

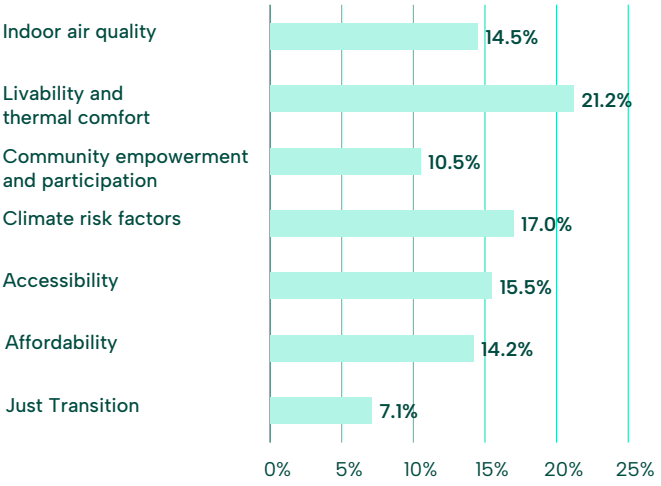



Fig. 14. Regional market opinion on the key aspects for decision-making at early stages of the buildings and construction lifecycle (percentages reflect the share of total responses).

# Opportunities and challenges

The survey evaluated 28 readiness strategies spanning the five pillars of the Readiness Framework. Each strategy was rated by stakeholders for both its importance and likelihood of implementation, using a scale from 1 (lowest) to 5 (highest). A full list of these strategies, organised by pillar, is included in the Annex.

To better understand the relationship between perceived importance and feasibility, the strategies were plotted on an importance-versus-likelihood matrix. This visual approach groups strategies into four categories:

- high importance, high likelihood: priority actions
- high importance, low likelihood: critical gaps
- low importance, high likelihood: lower priority interventions
- low importance, low likelihood: considered not relevant

Figure 15 presents a full overview of all strategies within this matrix, while Figure 16 offers a zoomed-in version to more clearly illustrate distribution and clustering.

The analysis shows that most strategies cluster within the gaps quadrant — those seen as important but unlikely to be implemented under current conditions. A smaller number of strategies fall in the actions quadrant, where both importance and feasibility are high. These represent the key opportunities that can be leveraged immediately and the most pressing gaps that must be addressed to support the development of national roadmaps.

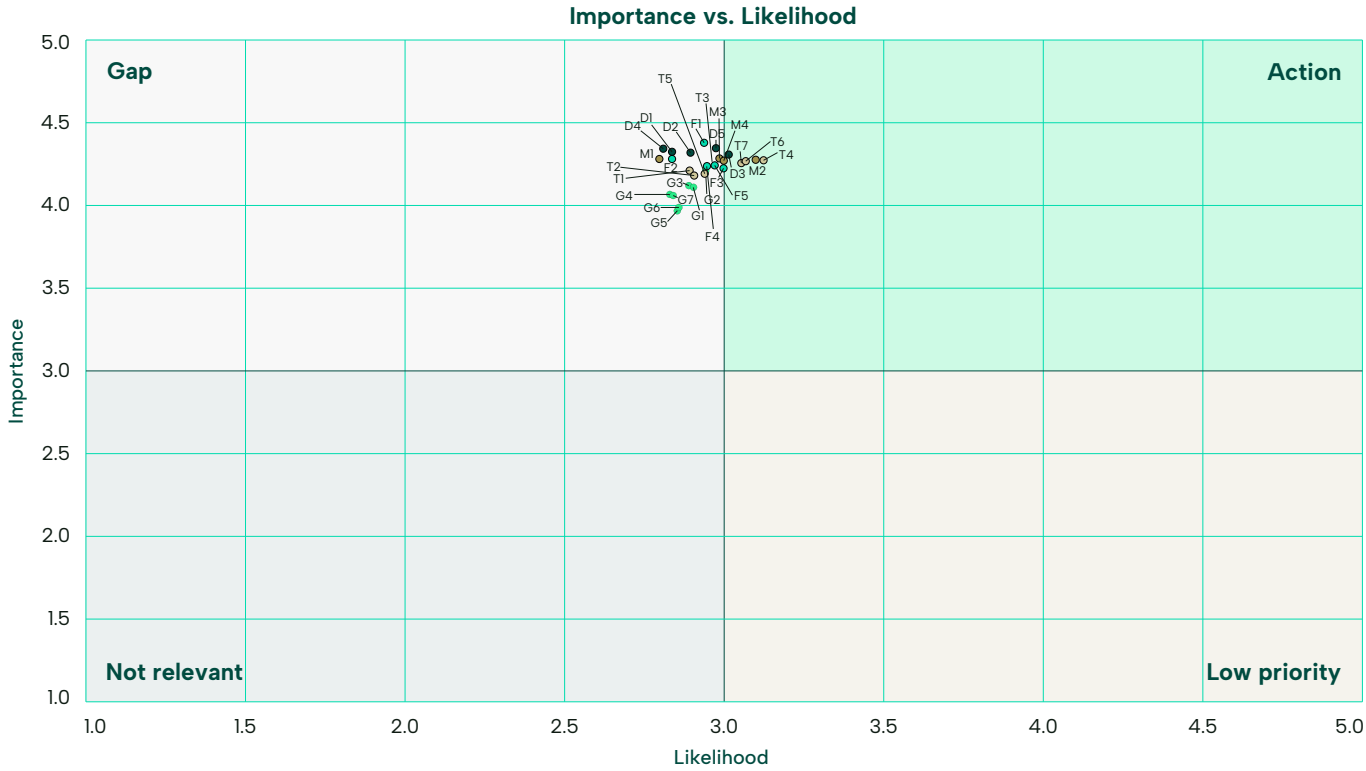



Fig. 15. Regional importance vs. likelihood of assessed decarbonisation and resilience strategies.

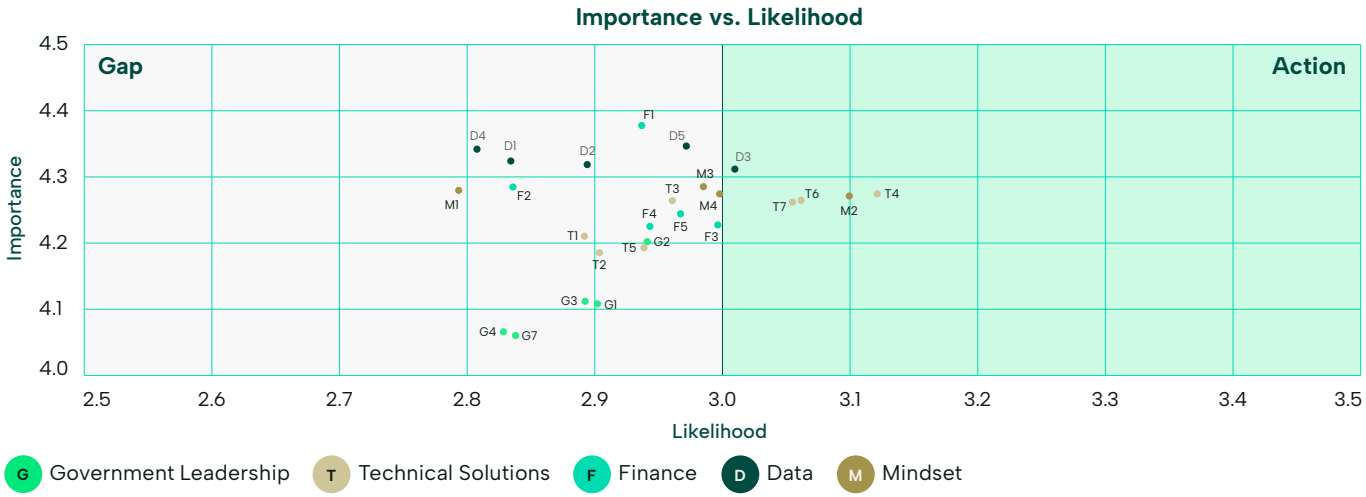



Fig. 16. Zoom-in of the regional results of assessed decarbonisation and resilience strategies.

The regional results of the importance and likelihood of strategies to drive decarbonisation and climate resilience in the built environment are as follows:

## Gaps: Main challenges (high importance and low likelihood):

These strategies are identified as critical but unlikely to be implemented without significant support and structural change:

- **F1** Establish a financial model, with fiscal and non-fiscal incentives for zero-carbon and resilient projects in the construction sector*
- **D5** Capacity building in mechanisms and information technologies for measurement, registration, verification and reporting of emissions*
- **M3** **M4** Existence of mechanisms for capacity development in energy efficiency, decarbonisation, climate adaptation and resilience in buildings
- **F3** Linking energy efficiency, zero carbon and building resilience with ESG performance reporting frameworks and disclosure standards**

* **Most important gaps to address**

** **Gap more likely to become an opportunity**

As previewed in the section on 'Key opportunities and challenges for regional sustainable finance', financing remains the most significant challenge to advancing a decarbonised and climate-resilient built environment. However, this also presents a clear opportunity:

Financial institutions, in collaboration with local governments, can close this gap by:

- establishing fiscal and non-fiscal incentives for zero-carbon and resilient buildings
- aligning investments with ESG reporting and disclosure frameworks

These actions can support the scale-up of sustainable construction and strengthen climate-aligned investment across the region.

## Actions: Key opportunities (high importance and high likelihood):

The following strategies represent immediate opportunities for progress:

- **T4** Availability of renewable energies for integration into the decarbonisation pathway of buildings*
- **M2** Establishment of a national working group on energy efficiency, zero carbon and resilience in buildings
- **T6** Training in selection criteria of technical solutions for decarbonisation and climate resilience
- **D3** Digital solutions for measurement, monitoring, control and automation of buildings (e.g. BIM, AI, 5G, big data)**

* **Most important and likely strategies to consider**

** **Most important opportunity**

# Strategies ranking for each pillar

Each of the 28 strategies was assessed by respondents based on two criteria: importance (I) and likelihood (L), both rated on a scale from 1 (lowest) to 5 (highest). The total score (I+L) for each strategy was then used to determine its relative ranking within each of the five pillars.

The following sub-sections present the highest-ranking strategies per pillar, reflecting the region's perceived priorities and the feasibility of implementation. The corresponding figures (Figs. 17–21) illustrate these rankings in full.

## Government leadership

For this pillar, the highest-ranking strategy was:

- G2: Existence of a national energy efficiency policy or strategy for the construction and operation of buildings

Closely followed by:

- G1: Existence of mandatory regulations and/or performance requirements related to a national goal of zero carbon in buildings

This indicates that stakeholders strongly support the formalisation of ambitious policies to guide sectoral decarbonisation, as shown in Figure 17.

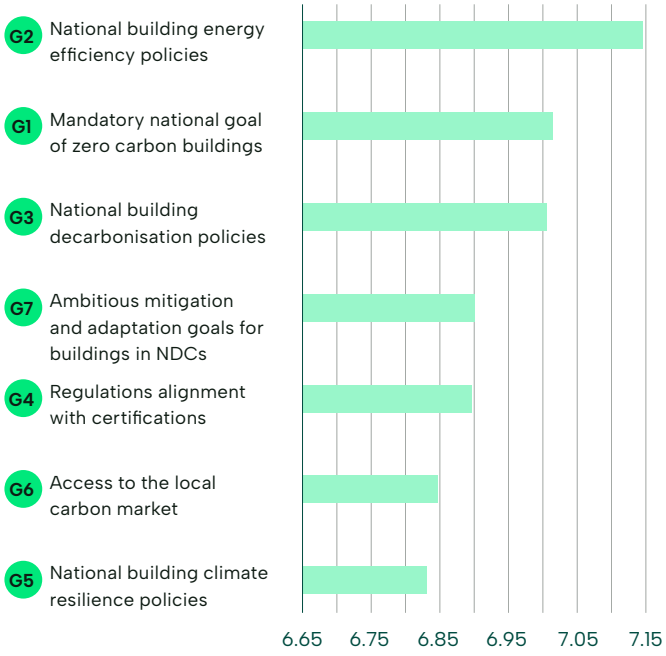



Fig. 17. Ranking (I+L) of the government leadership pillar strategies.

## Technical solutions

The top strategies in this pillar highlight both technology and training:

- T4: Availability of renewable energies for integration into the decarbonisation pathway of buildings
- T6: Training in selection criteria of technical solutions for decarbonisation and climate resilience

These results emphasise the need for both supply-side infrastructure and capacity building to accelerate adoption, as shown in Figure 18.

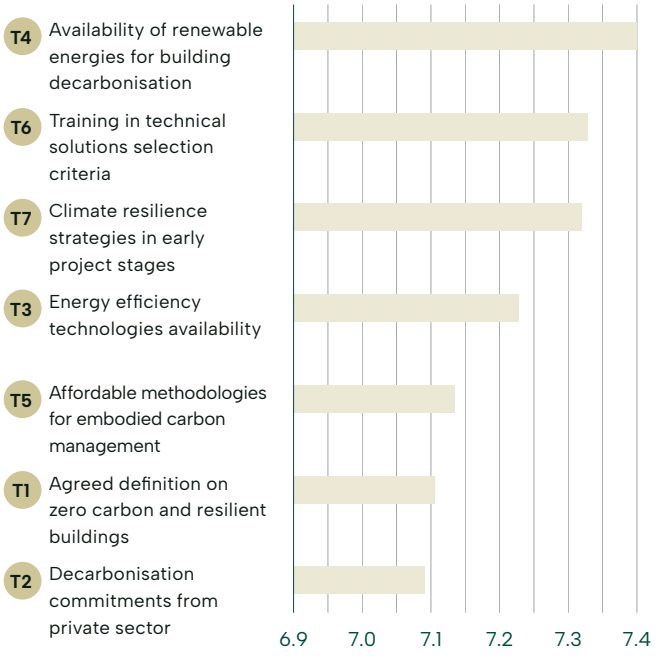



Fig. 18. Ranking (I+L) of the technical solutions pillar strategies.

## Finance

Finance continues to be a critical enabler. The highest-ranked strategies are:

- F1: Establish a financial model with incentives for zero-carbon and resilient projects in the construction sector
- F3: Linking energy efficiency, zero carbon and building resilience with ESG performance reporting frameworks and disclosure standards

This underscores the urgent need for mechanisms that align financing with sustainability outcomes, as shown in Figure 19.

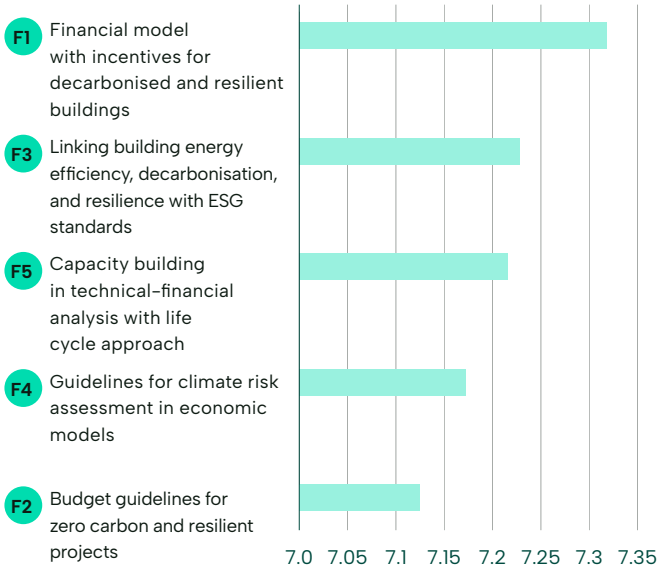



Fig. 19. Ranking (I+L) of the finance pillar strategies.

## Data

The data pillar highlights the importance of digital solutions and technical capacity:

- D3: Digital solutions for measurement, monitoring, control and automation of buildings
- D5: Capacity building in mechanisms and IT for emissions measurement, registration, verification and reporting

These are crucial for developing baselines, setting targets, and tracking progress, as shown in Figure 20.

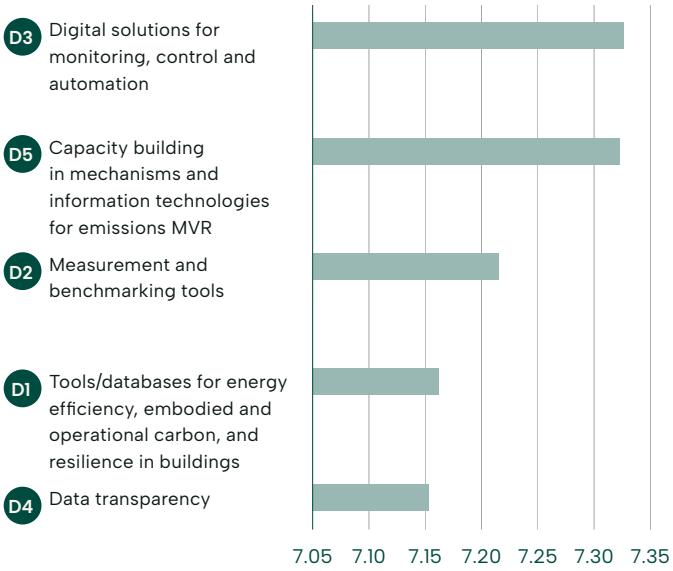



Fig. 20. Ranking (I+L) of the data pillar strategies.

## Mindset

Mindset scored highest overall as a pillar (see Section 'Overall ranking of pillars'), with capacity development emerging as key:

- M2: Establishment of a national working group on energy efficiency, zero carbon and resilience in buildings
- M4: Existence of a mechanism for capacity development in climate adaptation and resilience in buildings

These findings, shown in Figure 21, point to the importance of multi-sector coordination and training to drive cultural and behavioural change.

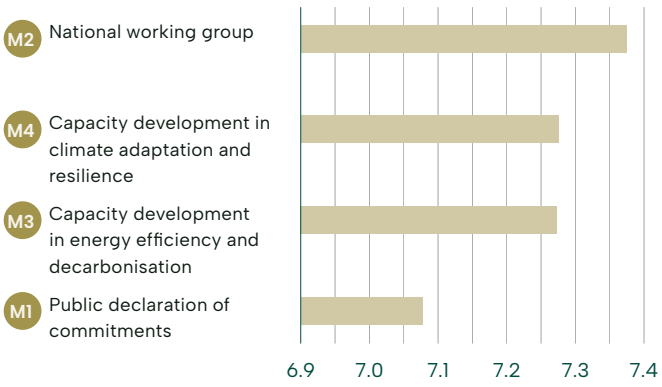



Fig. 21. Ranking (I+L) of the mindset pillar strategies.

# Overall ranking of pillars

The average combined score of importance and likelihood across all 28 strategies reveals how each pillar is prioritised in the region, as shown in Figure 22. Among the five pillars, mindset received the highest overall ranking, followed by data and technical solutions. These three pillars are seen as having the greatest potential to drive impact, while also being feasible to address in the near term.

This suggests that while technical innovation and data existence and availability are critical, cultural change, collaboration, and long-term skill development are perceived as the most urgent enablers for transforming the building and construction sector across Latin America.

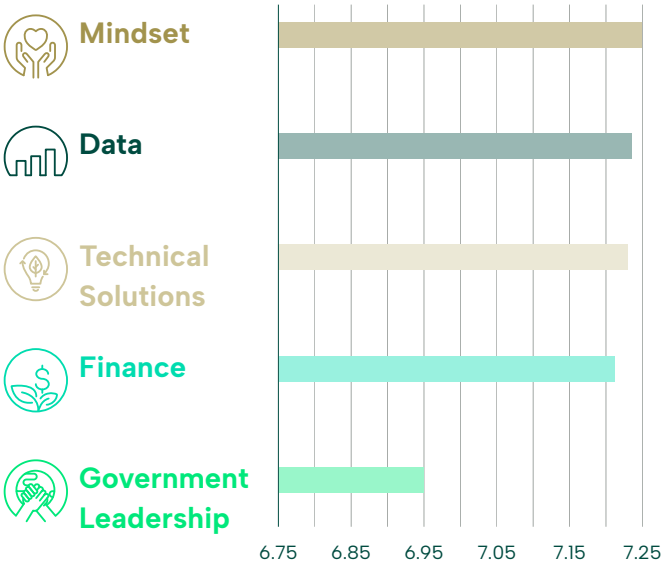



Fig. 22. Overall ranking (I+L) by pillar.

# Conclusions

This report presents the first regional analysis of market readiness to develop national roadmaps for a decarbonised and climate-resilient built environment in Latin America. Based on the engagement of over 420 stakeholders from seven national Green Building Councils, the findings offer a clear view of both the challenges and opportunities facing the region.

The most important strategic pillars identified were mindset, data, and technical solutions. These areas are not only considered high priority but also achievable with the right investment, collaboration, and policy support.

### Key insights include:

**Policy alignment and leadership** are essential. Existing national regulations often lack alignment with zero-carbon certification schemes, and more ambitious inclusion of the sector in updated NDCs is needed.

**Technical solutions** such as low-carbon materials, efficient HVAC systems, and digital tools are well-recognised, but their affordability and accessibility vary significantly across countries.

**Finance** is the most significant barrier. There is a clear lack of dedicated financial instruments and incentives to support sustainable construction, but this gap presents a strong opportunity for public-private innovation.

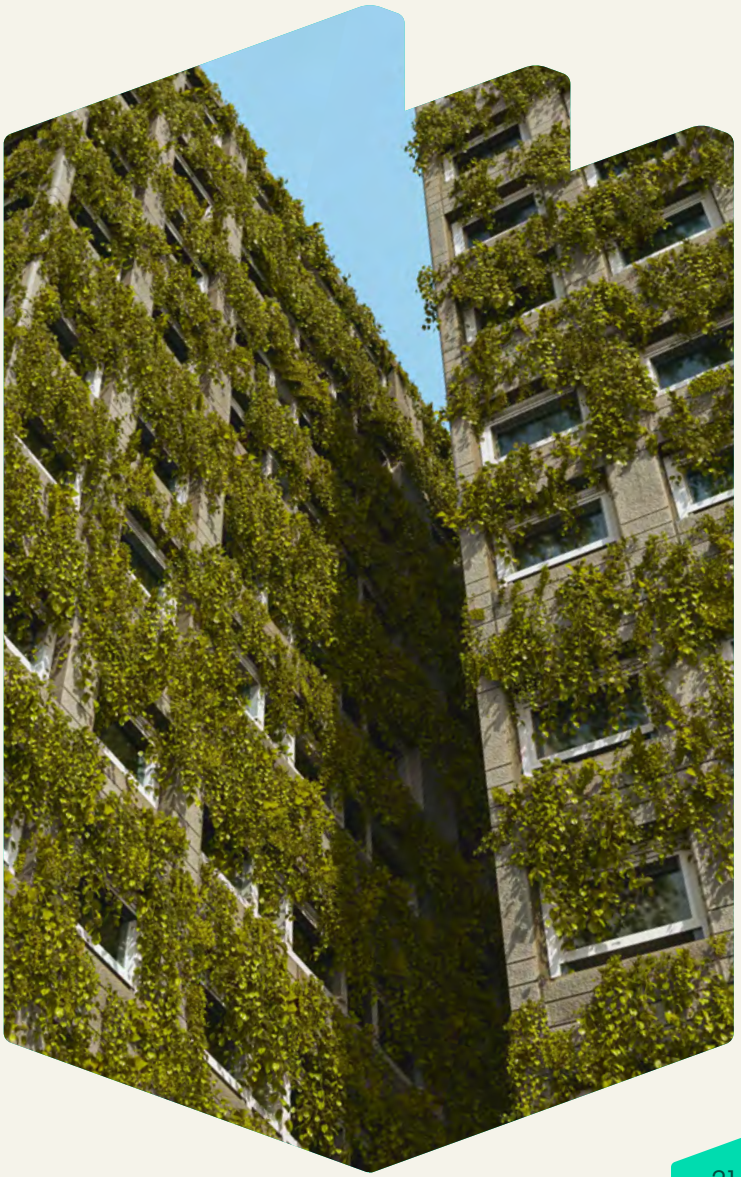
**Data** availability is a major limitation. The absence of standardised baselines and performance metrics restricts the ability to set targets and track progress, yet digital tools offer clear pathways to improve this.

**Mindset** emerges as both the highest-scoring and most feasible area for progress. Community engagement, capacity building, and transparent governance are seen as key to shifting perceptions and scaling sustainable practices.

These conclusions provide a foundation for designing tailored enabling actions that respond to country-specific contexts and stakeholder needs. They also confirm that a regional approach to supporting national roadmap development is both timely and essential.

Looking ahead, the results suggest that national strategies should prioritise renewable energy integration, technical training, and digital tools to improve baselines and performance tracking. These can be supported by robust financial models and ESG-aligned policy frameworks.

Encouragingly, the fact that mindset was ranked as both highly important and highly likely signals strong regional momentum. With the right capacity-building, collaboration, and investment, Latin America is well-positioned to accelerate the transition to a sustainable, decarbonised, and resilient built environment.



# Next steps

This report marks the completion of the first phase of the Latin America Zero Carbon and Climate Resilience Readiness Framework. Through multi-country collaboration and regional consultation, it has identified the main challenges and opportunities for developing national roadmaps for a decarbonised and climate-resilient built environment.

The next phase of this initiative will focus on:

- developing a matrix of enabling actions, derived from the readiness strategies assessed across all five pillars
- validating this matrix through national multi-stakeholder workshops
- clearly defining key actors, timelines, and indicators to track progress

The enabling actions matrix will serve as a strategic tool to guide the roadmap development process in each country. It will help align public policy, private sector initiatives, and civil society engagement around common priorities.

WorldGBC and its network of national Green Building Councils will be organising national workshops across the region to support this validation process. These workshops will be participatory and open to stakeholders from all sectors. To stay informed and participate, please contact your local GBC or visit www.worldgbc.org for updates.

Your insights and engagement are essential to shape robust, inclusive roadmaps that reflect national contexts and priorities. We encourage governments, industry, academia, finance, and community-based organisations to join this next phase.

By working together, stakeholders across Latin America can accelerate the shift to a decarbonised, resilient, and equitable built environment — delivering lasting environmental, social, and economic benefits across the region.

# Annex

Below is the full list of assessed strategies across each of the five strategic pillars. These were evaluated based on their perceived importance and likelihood of implementation as part of the Readiness Framework.

## Government Leadership

The assessed strategies related to the technical solutions pillar were the following:

- **G1** Existence of mandatory regulations and/or performance requirements related to a national goal of zero carbon in buildings
- **G2** Existence of a national energy efficiency policy or strategy for the construction and operation of buildings
- **G3** Existence of a national decarbonisation policy or strategy for the construction sector and its value chain
- **G4** Availability of regulations aligned with zero carbon certification systems
- **G5** Existence of a national climate resilience policy or strategy for the construction sector and its value chain
- **G6** Availability and access to a local carbon market (measurement, reporting and verification)
- **G7** Incorporation of more ambitious mitigation and adaptation commitments for the sector in the NDCs

## Technical Solutions

The assessed strategies related to the technical solutions pillar were the following:

- **T1** Having a clear and agreed definition of zero carbon and resilient buildings
- **T2** Establishment of public commitments by the private sector to decarbonise their assets and make them climate resilient
- **T3** Availability of technologies for the implementation of energy efficiency strategies and improvement of energy performance from the design stage
- **T4** Availability of renewable energies for integration into the decarbonisation pathway of buildings
- **T5** Knowledge of affordable methodologies for the calculation and management of embodied carbon and consulting services
- **T6** Training in selection criteria of technical solutions for decarbonisation and climate resilience
- **T7** Incorporation of climate resilience strategies from project planning and design

## Finance

The assessed strategies related to the finance pillar were the following:

- **F1** Establish a financial model, with fiscal and non-fiscal incentives for zero-carbon and resilient projects in the construction sector
- **F2** Establishment of budget guidelines for zero-carbon and resilient construction projects
- **F3** Linking energy efficiency, zero carbon and building resilience with ESG performance reporting frameworks and disclosure standards
- **F4** Guidelines for the verification and disclosure of climate risks to include in project economic models
- **F5** Capacity building in technical-financial analysis with a project life cycle approach and best practices considering climate mitigation and adaptation

## Data

The assessed strategies related to the data pillar were the following:

- **D1** Provide tools or databases for defining energy efficiency, embodied and operational carbon, and resilience goals for the construction sector
- **D2** Provide measurement and benchmarking tools for efficient, zero-carbon buildings and resilient
- **D3** Digital solutions for measurement, monitoring, control and automation of buildings such as BIM modelling, artificial intelligence, high speed mobile data (i.e.. 5G), and big data
- **D4** Data transparency to promote leadership, favour comparability, management and trust in the dissemination of results
- **D5** Capacity building in mechanisms and information technologies for measurement, registration, verification and reporting (MVR) of emissions

## Mindset

The assessed strategies related to the Mindset Pillar were the following:

- **M1** Existence of a "public declaration of commitments" as a requirement to ensure transparency, access to financial and regulatory incentives for the public sector
- **M2** Establishment of a national working group on energy efficiency, zero carbon and resilience in buildings
- **M3** Existence of a mechanism for capacity development in energy efficiency and decarbonisation in buildings
- **M4** Existence of a mechanism for capacity development in climate adaptation and resilience in buildings

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