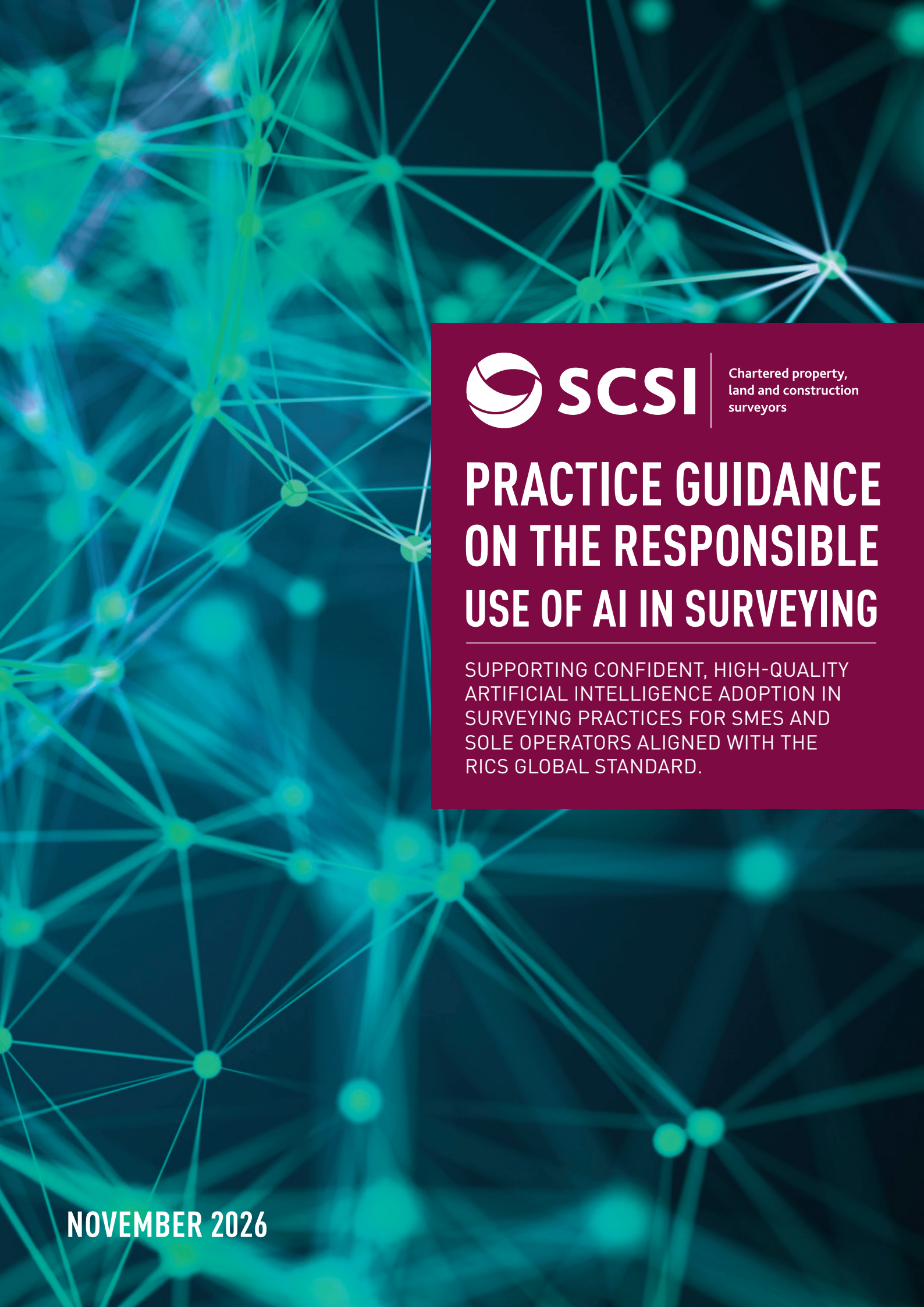

SCSI

Chartered property, land and construction surveyors

PRACTICE GUIDANCE ON THE RESPONSIBLE USE OF AI IN SURVEYING

SUPPORTING CONFIDENT, HIGH-QUALITY ARTIFICIAL INTELLIGENCE ADOPTION IN SURVEYING PRACTICES FOR SMES AND SOLE OPERATORS ALIGNED WITH THE RICS GLOBAL STANDARD.

NOVEMBER 2026

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Published by the Society of Chartered Surveyors Ireland, November 2026.

The SCSI gratefully acknowledges the contributions of members of its Digitisation Working Group, Standing Committees and Professional Groups, together with the support of the Royal Institution of Chartered Surveyors (RICS). Special thanks are extended to Patrick King (SCSI) and Antony Slumbers for their drafting and editorial contributions to this guidance.

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CONTENTS

Quick reference: classifying and governing AI use 4

0. Foreword 6

1. Introduction 7

1.1 Purpose and scope 7
1.2 The case for AI-assisted practice 7
1.3 How to use this guidance 8
1.4 AI competence and the SCSI Code of Conduct 8

2. Guiding principles 9

2.1 Professional judgement remains paramount 9
2.2 Accountability stays with the professional 9
2.3 Governance proportionate to the application 10
2.4 Transparency with clients 10
2.5 Continuous competence 10
2.6 Continuous professional awareness of AI impact and opportunities 10

3. Understanding AI as a tool for professionals 11

3.1 What counts as AI for this guidance 11
3.2 Capabilities relevant to surveying practice 11
3.3 Limitations and failure models 13
3.4 The specific challenge of generative AI 13
3.5 Common failures of generative models 13

4. Proportionate governance 15

4.1 The proportionality principle 15
4.2 Three tiers of AI application 15
4.3 Incidental use 15
4.4 Assisted practice 15
4.5 Embedded reliance 16
4.6 Classifying your use 17
4.7 Governance expectations by tier 18
4.8 Data stewardship across all tiers 18
4.9 When classification is uncertain 18

5. Competence 19

5.1 Baseline AI literacy 19
5.2 Enhanced competence for embedded reliance 20
5.3 Maintaining competence as technology evolves 20
5.4 Firm responsibilities 20

6. Assurance, verification and professional judgement 21

6.1 The verification imperative 21
6.2 Verification approaches by output type 21
6.3 Syntax versus substance 22
6.4 Documentation appropriate to tier 22
6.5 Quality assurance for high-volume applications 23

7. Client service and transparency 24

7.1 Terms of Engagement and reporting 24
7.2 Explaining AI involvement appropriately 25
7.3 Client preferences and choices 25

8. Regulatory and liability context 26

8.1 EU AI Act: surveying in context 26
8.2 Data protection essentials 27
8.3 Firm policies or contractual obligations 28
8.4 Professional liability and insurance 28

9. Opportunity and responsibility 29

9.1 Quality, consistency and capability 29
9.2 Responsible adoption as professional commitment 29
9.3 Training 30
9.4 Looking forward 31

10. Appendix A: Glossary 32
11. Appendix B: Proportionality self-assessment 34
12. Appendix C: Client disclosure templates 36
13. Appendix D: AI supplier and system assessment questions 38
14. Appendix E: Resources 39
15. Appendix F: Illustrative AI use cases by proportionality tier 40
16. Appendix G: Working under both SCSI and RICS requirements 42
17. Appendix H: Template for AI usage policy 43
18. Appendix I: AI workflow 45

QUICK REFERENCE: CLASSIFYING AND GOVERNING AI USE

After reviewing the full document, use this framework for day-to-day use.

A simple rule: the more your professional judgement depends on AI, the more assurance you need. Routine tasks require no more than normal professional care. Where AI informs a professional opinion, outputs should be checked against reliable sources. Where scale makes individual verification impractical, confidence should be established through testing, validation, and ongoing monitoring of the system itself, in a manner proportionate to the potential risk and impact.

This guidance groups AI use into three tiers: incidental use, assisted practice, and embedded reliance. Identify the tier, apply the corresponding safeguards, and exercise professional judgement throughout.

Start by asking three questions:

- Does the AI output have, or could it have, a material influence on your work?
- How will the reliability of the AI output be established if relied upon for a professional opinion?

THE THREE TIERS

TIER	WHAT IT COVERS	WHAT YOU SHOULD DO
Incidental use	Peripheral to the work: spelling/grammar, formatting, scheduling, background reading later verified against real sources.	Nothing specific. Normal professional care applies. Review before issuing.
Assisted practice	AI meaningfully contributes to the drafting, comparable identification, summarisation, or other meaningful impact of your professional work, and you verify the output against the source material yourself.	Check material content against sources and validated data. Record significant verification. Apply documentation and communication requirements where AI significantly affects service delivery.
Embedded reliance	Volume or process makes individual source checking impractical. Confidence comes from the system, not case-by-case checking.	Apply enhanced system and process assurance, including proportionate supplier due diligence, documented testing, quality assurance (QA) and exception review. Separately assess and record whether the AI use has a material impact on service delivery. Where it does, comply with the applicable RICS requirements for client communication, documentation and reliability assessment, and consider any professional indemnity implications.

If classification is uncertain, pause and document the factors considered, including materiality, verifiability, and consequence. Seek appropriate advice where the distinction would materially alter the governance response. A precautionary higher-tier approach may be appropriate while uncertainty is resolved.

Go to>> Classifying a specific use: Appendix B (Proportionality self-assessment)

Verification against the underlying evidence is an important indicator of the appropriate tier, but it should be considered alongside the materiality of the AI contribution and the potential consequences of error.

- If the AI output were incomplete, inaccurate or inappropriate, would it impact your professional opinion?

Verification against the underlying evidence is an important indicator of the appropriate tier, but it should be considered alongside the materiality of the AI contribution and the potential consequences of error.

AI should be augmentative, not delegative. The professional must remain capable of understanding the task, assessing the output, recognising limitations or errors, and taking responsibility for the resulting professional work.
Remember, this policy should be considered in the context of the RICS Professional Standard.

Go to>> Working under both SCSI and RICS requirements: Appendix G

Six principles behind the framework

1. Professional judgement remains paramount. AI informs your view; it doesn't replace it.
2. Accountability stays with you. You can't shift responsibility for defective work onto the AI system or its vendor.
3. Governance should be proportionate: greater scrutiny where consequences are serious, minimal friction where they aren't.
4. Clients are entitled to know when AI materially shapes professional work done on their behalf.
5. The core technical and professional competences required for each discipline remain; surveyors using AI must maintain the knowledge and competence to do so.
6. Surveyors should remain informed about relevant AI developments and be capable of assessing their implications and potential value for professional practice.

Go to>> Setting firm policy: Appendix H (Template for AI usage policy)

Syntax vs substance – the trap to avoid

Generative AI is optimised to sound right, not to be right. Text that reads fluently and confidently can still be entirely fabricated. Checking that AI output is well written tells you nothing about whether it's true: verify the substance separately from the style.

Data: the practical rules

Do not input personal, confidential, privileged or commercially sensitive information into an AI system unless the organisation has confirmed that the proposed use is lawful, secure and consistent with contractual, client and organisational requirements. An 'enterprise' label does not, by itself, establish that a tool is suitable for every category of information.

Go to>> Vetting a vendor: Appendix D (AI supplier and system assessment questions)

Telling clients

Where AI has a material impact on service delivery, members must comply with the applicable RICS client communication requirements. In other contexts, communication should be proportionate to the significance of the AI contribution and the reasonable expectations of the client.

Go to>> Client wording: Appendix C (Client disclosure templates)

FOREWORD

Dear fellow member,

Artificial intelligence (AI) is rapidly becoming part of our lives and work. It is no longer simply a question of whether it will impact the work of Chartered Surveyors, but how we can adapt to and use it responsibly and effectively.

In our strategic plan, Roadmap 2027, the Society of Chartered Surveyors Ireland (SCSI) committed to supporting members in responding to the profession's changing needs, with digitisation, innovation, and emerging technologies identified as key priorities. Last year, we launched our Digitisation Strategy, setting out a shared direction for embracing digital transformation across the property, land and construction sectors.

This guidance represents an important step in delivering on those ambitions. Building on the RICS global professional standard, it provides members with a practical framework for understanding the opportunities and risks associated with AI, and applying appropriate safeguards in their professional work. It also helps members to understand the legal, ethical and professional requirements that underpin the trust placed in us by clients and the public.

As Chartered Surveyors, our expertise, independence and professional judgement are fundamental to our profession. Throughout our history, technological innovation has transformed how we work, improving efficiency, expanding our capabilities, and enhancing the services we provide.

From the theodolite to spreadsheets, and from online property platforms to building information modelling (BIM), surveyors have continually adapted to new technologies. AI represents the latest development in that evolution, offering considerable opportunities while bringing new responsibilities, particularly around accuracy, transparency and accountability. It is a tool that should support, rather than replace, professional judgement.

As a professional body, our role is to help members to navigate this change with confidence, providing the guidance, knowledge and skills needed to adapt and succeed.

The pace of technological change also means that developing AI literacy and maintaining relevant skills through continuing professional development (CPD) will be increasingly important in responding to the evolving expectations of clients, employers and the public.

I encourage all members, across every surveying discipline, to engage with this guidance and consider how AI can be used responsibly in their own practice.

By embracing innovation while upholding the professional values that define us, we can strengthen the services we deliver and the contribution our profession makes to society.

While the tools we use will continue to evolve, responsibility for the professional advice and services we provide remains firmly with us.

By embracing innovation while upholding the professional values that define us, we can strengthen the services we deliver and the contribution our profession makes to society.



Tomás Kelly

President, Society of Chartered Surveyors Ireland

November 16, 2026

1. INTRODUCTION

This guidance provides an SCSI practice framework to assist members in implementing the RICS Professional Standard on the responsible use of artificial intelligence in surveying practice within an Irish professional and regulatory context.[1] It supports members in recognising the use of AI, assessing its significance, applying proportionate controls, and maintaining professional judgement and accountability. At the heart of this guidance and framework is the fact that SCSI members are, and will always be, responsible for the professional judgement they provide. They must ensure that they have met the accountability (professional), governance (organisational), and transparency (client) standards appropriate to the AI usage as set out in this document. To this end, this guidance will help members to:

- assess and classify distinct uses of AI;
- apply verification, assurance and governance proportionate to materiality, verifiability and consequence;
- meet applicable client communication requirements and provide proportionate explanations of material AI involvement;
- provide organisational controls to ensure that AI systems are used within an agreed purpose, and checks are in place; and,
- most importantly, ensure that professional judgement was appropriately exercised in compliance with legal, ethical, and commercial expectations.

1.1 PURPOSE AND SCOPE

What is AI? For the purposes of this guidance, 'artificial intelligence' encompasses computational systems that learn from data, generate content, or produce analytical outputs through methods that are not fully transparent or deterministic. This includes machine learning systems, large language models (LLMs), automated valuation models incorporating pattern recognition, and platforms that identify anomalies or generate predictions based on training data.

For the purpose of this guidance, the relevant **distinction is whether the system uses AI capabilities to generate, infer, classify, predict, recommend or otherwise generate an output that may influence a surveyor's professional work.** The appropriate governance response depends on the use and impact of the output, not simply on whether the system's internal decision pathway is visible. In the models, the professional must assess results rather than trace the logic. Conventional software, spreadsheets performing defined calculations, databases retrieving stored information, and word processors fall outside this definition even when marketed as 'intelligent', unless they incorporate AI capabilities of the kind described.

The guidance does not attempt to apply uniform governance to every AI interaction. The requirements appropriate for casual use of a language model to improve draft wording differ fundamentally from those warranted when automated systems contribute to valuation conclusions.

Section 4, therefore, establishes a proportionality framework with three tiers:

- incidental use;
- assisted practice; and,
- embedded reliance.

Each of these tiers carries governance expectations scaled to risk. This replaces the binary-threshold approach in some existing guidance with a graduated structure that enables confident adoption at lower-risk levels while maintaining rigorous standards where AI materially shapes professional outputs. This guidance is deliberately profession wide. It does not replace discipline-specific requirements relating to valuation, measurement, geospatial information, construction cost, building inspection, property management, or other specialist services. Members must continue to apply the technical standards relevant to their own work.

1.2 THE CASE FOR AI-ASSISTED PRACTICE

AI tools have reached a maturity that warrants professional guidance. Professionals are already using them; **the question is no longer whether AI will feature in surveying practice, but whether it will be used well.**

The case for AI-assisted practice rests on client value and protection of professional judgement. Where AI enables more thorough analysis, greater consistency, or faster delivery without compromising professional standards, its use directly serves clients' interests. The examples below are illustrative rather than discipline-specific technical guidance:[2]

1 This SCSI guidance does not replace mandatory obligations under RICS Professional Standards. Firms regulated by the RICS must comply separately with the RICS Professional Standard on responsible use of artificial intelligence (September 2025) from March 9, 2026. Where the RICS Professional Standard applies, its mandatory requirements take precedence. Applicable law, court directions, service-specific standards and contractual requirements must also be observed. The SCSI three-tier framework provides a practical route for assessing use and identifying an appropriate response; it does not displace those requirements. Additionally, this guidance does not replace the need for firm-level AI policies where required by regulation. See Appendix G for further details.

2 The SCSI's Professional Group Committees will be reviewing whether to supplement this paper with discipline-specific applications, risks, verification methods, and standards relevant to their areas of practice.

- A commercial agency surveyor advising on a portfolio acquisition can systematically identify patterns across hundreds of comparable transactions, work that would be impractical through manual research and that may produce better-informed advice.

- A Registered Building Surveyor can cross-reference observed defects against performance databases spanning thousands of similar buildings, which may improve diagnostic accuracy.

- A valuation surveyor can test sensitivity across multiple market scenarios while the client waits, rather than delivering a single-point estimate days later, thereby supporting faster delivery while maintaining appropriate verification and professional review.

- A Registered Quantity Surveyor can analyse large volumes of cost, procurement, and project data to identify trends, benchmark performance, test scenarios, and highlight anomalies across projects, which may support more informed cost advice while maintaining appropriate verification and professional review.

- A geospatial and measurement application may include feature classification, change detection, processing of imagery or point cloud data, and quality review. AI processing does not displace requirements concerning measurement accuracy, co-ordinate reference, provenance, metadata, fitness for purpose, or applicable standards.[3]

These capabilities translate into tangible client benefits: the potential to consider a broader evidential base, faster report delivery, and consistency across instructions that manual processes struggle to achieve. Firms that integrate AI effectively will offer levels of analytical depth and responsiveness that clients will come to expect. This guidance exists to support that transition. It is produced proactively to enable confident, high-quality adoption rather than to manage a problem. The objective is to help professionals to realise AI's benefits while maintaining the professional standards that justify client trust. Where AI tools can genuinely enhance professional work, members should be equipped to evaluate their benefits, limitations and suitability. The decision to adopt an AI tool remains a professional and organisational judgement, subject to applicable standards and the circumstances of the service.

1.3 HOW TO USE THIS GUIDANCE

The guidance is structured to build understanding before imposing requirements.

Section 2 establishes six guiding principles, the foundational commitments that inform everything that follows.

Section 3 develops the technical literacy professionals need to exercise judgement about AI use, with particular attention to generative AI and its distinctive failure modes. These sections are deliberately placed before the governance framework because proportionate governance requires understanding both the principles at stake and the technology being governed.

Section 4 introduces the proportionality framework and its three tiers. This is the structural heart of the document: professionals should be able to classify their use of AI and identify the corresponding governance expectations.

Sections 5 and 6 address competence and verification, the operational requirements for AI-assisted practice.

Section 7 covers client service and transparency.

Section 8 provides a regulatory and liability context.

Section 9 concludes with the opportunity that responsible AI adoption represents and training.

Professionals should read Sections 2 through 4 in full to understand the framework. Subsequent sections can be consulted as relevant to specific applications. Members seeking a concise starting point should:

- read the principles and three-tier framework;
- complete the proportionality assessment for the proposed use;
- follow the relevant verification, competence and communication guidance; and,
- retain records proportionate to the significance of the use.

The appendices provide practical implementation tools: Appendix B offers a self-assessment for classifying AI use within the proportionality framework; Appendix C provides client disclosure templates; and, Appendix D sets out AI supplier and system assessment questions for embedded reliance applications.

1.4 AI COMPETENCE AND THE SCSI CODE OF CONDUCT

Under the SCSI's Code of Conduct, "Members shall carry out their professional work with due skill, care and diligence and with proper regard for all technical standards, Applicable Standards and Mandatory Standards. The failure by a Member to comply with a Mandatory Standard may lead to action by the Director of Regulation and the Professional Conduct Committee under these Rules". Competent use of AI depends first on competence in the underlying professional task. Members should not use AI to undertake or approve work that they would not otherwise be competent to perform or assess. Appropriate AI literacy, including an understanding of limitations, data risks and verification, supplements rather than replaces discipline-specific expertise.

[3] GeoAI presents additional considerations concerning spatial accuracy, scale, resolution, topology, measurement uncertainty, provenance and interoperability. These matters are outside the full scope of this profession-wide guidance and will be addressed through supplementary guidance from the Geomatics PG.

2. GUIDING PRINCIPLES

Six principles govern the responsible use of AI in surveying practice. They are not arbitrary selections but reflect the SCSI's considered view of what matters most as AI becomes part of how surveyors work.

The first two principles establish the human-centred nature of AI-assisted practice: AI augments professional work but does not replace the judgement or accountability that define it. The third introduces proportionality, the mechanism by which governance enables rather than impedes beneficial use. The fourth addresses the client relationship. The fifth recognises that effective AI use requires competencies professionals must actively develop. The sixth recognises that surveyors should remain informed about relevant AI developments, and be capable of assessing their implications and potential value for professional practice. Together, these principles provide the foundation for everything that follows. They apply across all AI applications and all proportionality tiers, although their practical expression varies with context.

2.1 PROFESSIONAL JUDGEMENT REMAINS PARAMOUNT

AI systems can process data, identify patterns, generate drafts, and flag anomalies. They cannot exercise the contextual understanding, ethical reasoning, and professional insight that define surveying practice. The surveyor's trained judgement, developed through education, experience, and continuous professional development, remains the essential element of every engagement.

This is not a limitation to regret but a reality to embrace. AI is most valuable precisely when directed by professional judgement: knowing what questions to ask, recognising when outputs warrant scrutiny, and understanding how results apply to specific circumstances. The professional who understands this relationship can use AI confidently, deploying it for tasks it performs well while reserving for themselves the interpretive and evaluative work that requires human expertise.

AI should be used augmentatively (i.e., 'human in the loop') rather than delegatively ('fully automated'). However, the 'human in the loop' needs to apply their own professional rigour, not cursory reviews. Therefore, a professional should not rely on AI to supply expertise, experience or understanding that the professional does not possess.

When AI output conflicts with professional instinct, the professional investigates rather than defers. When AI suggests conclusions that seem anomalous, professional experience prompts scrutiny rather than acceptance. The surveyor who allows AI to override reasoned assessment has inverted the proper relationship between tool and professional.

AI outputs are not professional advice. An AI system may identify information, generate text, summarise documents, or highlight patterns. Professional advice arises only when a surveyor applies their knowledge, skills, experience, professional scepticism, and judgement to those outputs, and accepts responsibility for the resulting conclusion.

2.2 ACCOUNTABILITY STAYS WITH THE PROFESSIONAL

The professional who delivers work to a client is responsible for that work, regardless of which tools were used to produce it. If a valuation proves defective, the surveyor cannot shift responsibility to the AI system that assisted with comparable analysis. If a building survey misses a significant defect, the surveyor cannot attribute the failure to image recognition software. Professional accountability is not delegable to technology. This principle extends to the decision to use AI itself. Professionals are accountable for selecting appropriate tools, applying them to suitable tasks, and verifying the outputs before relying on them. The surveyor who uses an AI system beyond its validated capabilities or relies on AI output without appropriate verification bears responsibility for the consequences. Far from being burdensome, this principle preserves what makes professional service valuable. Clients engage Chartered Surveyors for accountable expertise, not automated output. The professional who maintains clear accountability while using AI effectively offers clients the best of both worlds: enhanced analytical capabilities backed by professional responsibility.

Professional judgement includes exercising professional scepticism. Surveyors should actively test AI outputs, challenge assumptions, investigate anomalies, and avoid treating system outputs as inherently reliable simply because they are confidently presented.

2.3 GOVERNANCE PROPORTIONATE TO THE APPLICATION

Not all uses of AI carry equal risk. Using AI to improve the clarity of client correspondence does not warrant the same oversight as using automated valuation models to assess lending security. Proportionate governance concentrates attention where consequences are significant and removes unnecessary friction from lower-risk applications. This is how governance enables adoption rather than impeding it.

Section 4 develops this principle through a three-tier framework that distinguishes between incidental use, assisted practice, and embedded reliance. The framework provides clear criteria for classification and specifies governance expectations appropriate to each tier. The underlying logic is straightforward: professionals should apply governance that matches their actual risk exposure, neither under-governing applications where errors carry serious consequences, nor burdening low-risk use with controls designed for high-stakes applications.

The proportionality principle guards against two failure modes. Under-governance exposes professionals and clients to avoidable risk. Over-governance – applying uniform heavy controls regardless of application – creates friction that deters beneficial use and teaches professionals to see AI primarily as a compliance burden. Neither serves the profession well.

2.4 TRANSPARENCY WITH CLIENTS

Clients are entitled to know when AI contributes materially to work performed on their behalf. This transparency respects the client's interest in understanding how their instructions are fulfilled, supports informed decisions about commissioned services, and maintains the trust on which professional relationships depend.

Appropriate transparency is not technical disclosure for its own sake. A client commissioning a rent review need not know the architecture of the language model that helped to structure the report.

They should know if an automated valuation model contributed to the assessment of comparable evidence, understand in general terms how that contribution was verified, and have the opportunity to raise concerns.

For a building survey where AI-assisted image analysis helped to identify potential defects, the appropriate disclosure might note that technology-assisted review supplemented the surveyor's physical inspection, with all flagged items verified on site.

Section 7 provides detailed guidance on implementing transparency across different service types and proportionality tiers. The governing principle is straightforward: clients should never be surprised to learn, after the fact, that AI played a significant role in work they commissioned.

2.5 CONTINUOUS COMPETENCE

Members using AI in professional work should maintain the knowledge and skills necessary to use it responsibly. All members should maintain sufficient awareness to recognise where AI may affect their work, including where it is used by clients, counterparties, suppliers, or other advisers. The depth of competence required should reflect the member's role, the nature of the application, and the potential consequences of error.

This is not a compliance obligation but a dimension of professional capability. The surveyor who develops genuine AI competence expands what they can offer clients: more systematic analysis, broader evidential foundations, and greater consistency across engagements. The surveyor who neglects this development increasingly limits their professional effectiveness as AI-assisted practice becomes standard across the profession.

AI competence is not a one-time acquisition. Technology evolves rapidly; professionals must stay current. This connects naturally to existing CPD frameworks; AI literacy is part of what it now means to maintain the knowledge and skills necessary for competent practice.

2.6 CONTINUOUS PROFESSIONAL AWARENESS OF AI IMPACT AND OPPORTUNITIES

Where AI tools genuinely enhance professional work, members should be equipped to evaluate their benefits, limitations and suitability. The decision to adopt an AI tool remains a professional and organisational judgement, subject to applicable standards and the circumstances of the service.

Professional practice evolves as new tools and methods become available. Members should stay informed about developments relevant to their work and be able to assess whether an AI-enabled method could improve quality, consistency, scope or client service. Adoption should follow a reasoned assessment of suitability, evidence, risk, and professional value.

This principle does not require the use of AI, nor does it assume that AI-assisted work is inherently superior to an established professional method. Members should, however, understand how AI is being used by clients, counterparties, advisers and other stakeholders, as this may influence the professional environment in which they operate.

The obligation to improve is not a burden imposed on the profession, but an opportunity to enhance the quality, consistency, and value of professional services.

3. UNDERSTANDING AI AS A TOOL FOR PROFESSIONALS

Effective use of any professional tool requires understanding what it does well, where it falls short, and how those characteristics should shape practice. AI is no different. This section provides the conceptual foundation professionals need to exercise sound judgement about AI adoption: not technical expertise, but the practical understanding necessary to use these tools responsibly and well.

3.1 WHAT COUNTS AS AI FOR THIS GUIDANCE

For practical purposes, AI refers to systems that perform tasks traditionally requiring human cognitive capabilities, such as pattern recognition, language processing, prediction, and decision support, and that learn from data rather than following rules explicitly specified by a programmer.

This captures the tools professionals will encounter: automated valuation models that identify pricing patterns from transaction data; document analysis systems that extract and summarise lease terms; image recognition that flags potential defects in building photographs; and, conversational tools that generate text in response to queries.

The definition excludes ordinary software. Spreadsheet calculations, database queries, and standard measurement tools operate through explicit rules, producing predictable outputs. The distinction matters because AI systems behave differently: they can produce unexpected outputs, perform inconsistently across contexts, and reason in ways that cannot be audited step by step. These characteristics require an adapted professional practice.

If there is uncertainty about whether a particular tool constitutes AI for purposes of this guidance, professionals should apply it. The proportionality framework in Section 4 ensures that governance scales to actual risk: applying the guidance to a borderline tool incurs little cost, while failing to apply it where needed could prove consequential.

3.2 CAPABILITIES RELEVANT TO SURVEYING PRACTICE

AI is not a single tool or application. It is a family of technologies that can analyse information, identify patterns, generate content, and assist decision-making at a scale or speed that may not otherwise be practical through unaided human effort.

For surveyors, AI's importance isn't just about automation. Instead, it enhances professional judgement by allowing experts to access more information, analyse larger datasets, and improve consistency. However, this relies upon the underlying system and data being reliable and appropriate for their tasks.

Across surveying practice, AI typically creates value in six broad ways:

1. Information processing at scale

Surveyors increasingly work with volumes of information that are difficult to review manually within commercial timeframes. AI systems can assist by extracting, organising, summarising, and structuring large quantities of material for professional review. Examples include:

- reviewing large numbers of lease documents;
- analysing planning documentation and submissions;
- organising due diligence materials;
- extracting key information from contracts and reports; and,
- reviewing extensive property portfolios.

Used appropriately, AI allows the professional to direct time towards interpretation and judgement rather than administrative processing.

2. Pattern recognition and insight

AI systems can identify patterns, relationships, anomalies, and trends

within datasets that may not be immediately apparent through manual review. Examples include:

- identifying comparable transactions;
- highlighting unusual lease terms;
- detecting trends across facilities management portfolios;
- recognising potential defects across large photographic records; and,
- analysing geospatial and environmental datasets.

These insights do not replace professional analysis; they provide additional evidence to support it.

3. Consistency and repeatability

Professional work often requires the same analytical approach to be applied repeatedly across numerous assets, documents, or instructions. AI can help to improve consistency by applying the same process across large volumes of information without the variability that can arise through manual repetition. Examples include:

- portfolio reporting;
- lease abstraction;
- property data analysis;
- compliance checks; and,
- condition assessment triage.

The benefit is not that AI is infallible, but that it can assist professionals in maintaining a consistent approach at scale.

4. Monitoring and data collection

AI may assist in analysing information collected from sensors, building systems, imagery, connected devices, and other monitoring sources. Examples include:

- identifying potential defects or changes in condition;
- monitoring asset and building performance;
- identifying changes in use or occupancy patterns;
- supporting planned and predictive maintenance; and,
- highlighting exceptions requiring professional review.

The value of these applications depends on the quality, representativeness, and reliability of the underlying measurements and data.

5. Communication and knowledge support

Generative AI can assist professionals in preparing first drafts, structuring reports, summarising information, or conducting preliminary research. Examples include:

- drafting sections of reports;
- preparing client communications;
- creating meeting summaries;
- structuring technical documents; and,
- synthesising information from multiple sources.

These applications can improve productivity, but they require careful verification because generative systems are designed to produce plausible content rather than guaranteed facts. Some systems use retrieval (Retrieval-Augmented Generation, called RAG AI) or grounding techniques to connect responses to identified documents or datasets. This can improve traceability, but it does not remove the need to confirm that the correct sources were retrieved, interpreted accurately, and applied in the appropriate context.

6. Extending professional capability

The greatest opportunity presented by AI is not simply efficiency. It is the ability to apply professional expertise across a broader evidential base than would otherwise be possible. A surveyor supported by appropriate AI tools may be able to consider more comparable evidence, review more documents, analyse more scenarios, or monitor more information than is practical with traditional methods alone.
The professional judgement, accountability, and responsibility remain with the surveyor. AI can examine more evidence; it does not provide professional advice.

AI refers to systems that perform tasks traditionally requiring human cognitive capabilities, such as pattern recognition, language processing, prediction, and decision support, and that learn from data rather than following rules explicitly specified by a programmer.

Across all applications, AI is most valuable when it enhances, rather than replaces, professional judgement. The role of AI is to assist the surveyor in gathering, organising, analysing, and presenting information.

The role of the surveyor is to apply experience, professional scepticism, context, and accountability in determining what that information means and how it should be relied upon. **AI may generate outputs. Professional judgement turns those outputs into professional advice.**

3.3 LIMITATIONS AND FAILURE MODES

AI systems fail in ways that differ from traditional tools, and these failure modes may escape conventional quality assurance (QA). Professionals must understand them to calibrate professional judgement appropriately.

Systematic bias

AI systems can inherit and amplify biases present in their training data. A valuation model trained predominantly on urban commercial transactions may perform poorly on rural properties, not through obvious error, but through subtle mispricing that appears plausible. More consequentially, systems assessing individuals, such as tenant screening, affordability scoring, and service request prioritisation, may produce outputs that systematically disadvantage protected groups, potentially breaching equality legislation regardless of intent. Professionals should not deploy AI for assessments affecting individuals without understanding how the system was validated for fairness. Where doubt exists, the application warrants classification as embedded reliance or may be unsuitable for AI assistance altogether.

Brittleness outside training distribution

AI systems perform well on data resembling their training set and may perform poorly on anything else, without warning. A document analysis tool trained on standard commercial leases may produce unreliable outputs when applied to unusual structures or unfamiliar property types. Strong performance in familiar contexts does not guarantee reliability in novel ones.

Opacity of reasoning

Unlike a calculation that can be checked step by step, many AI systems produce outputs through processes that cannot be meaningfully audited. This represents a significant departure from traditional practice.

When reviewing a junior colleague's work, a supervising surveyor can ask them to explain their reasoning. With AI, this is not possible. Professional verification must therefore focus on outputs, checking conclusions against source material, rather than evaluating the reasoning process. Section 6 addresses verification approaches in detail.

3.4 THE SPECIFIC CHALLENGE OF GENERATIVE AI

Generative AI systems such as Claude, ChatGPT, Perplexity, DeepSeek, Gemini and Microsoft Copilot that produce text in response to prompts warrant particular attention.

These tools are what most professionals will encounter first, and they offer immediate practical value: first drafts of reports and client correspondence produced in minutes rather than hours, lease summaries that accelerate due diligence, and structured notes from dictated site observations.

However, professionals should recognise that LLMs generate plausible text rather than retrieve guaranteed facts. These AI models are optimised to produce fluent, convincing responses, not to ensure factual accuracy.

This phenomenon, termed 'hallucination', is not an occasional error but an inherent characteristic of the technology. Consider a generative AI asked to summarise a commercial lease. The output might state that "the tenant has a break option exercisable at the end of year 5, subject to six months' notice", when the lease contains no break clause whatsoever. This fabricated term will appear with exactly the same confidence as accurately extracted terms. Nothing in the output itself distinguishes fact from invention. This is just one of the common failures a professional will need to check for.

The professional implication is critical: professionals must verify substance against source material, not merely assess whether the output seems reasonable. Section 6.3 addresses the essential distinction between syntactic review (does this read well?) and substantive verification (is this accurate?).

3.5 COMMON FAILURES OF GENERATIVE MODELS

The following is a current list, as of publication, of commonly reported model failures. It should not be viewed as a comprehensive list of model failures, but rather as common enough that you should be confident your review process would catch these or similar issues before they make it into your work.

Hallucinations

The most commonly cited failure of generative AI systems is

hallucination, in which they may produce entirely fabricated outputs that appear fluent and authoritative. When a system lacks sufficient information, it may generate plausible-sounding but incorrect facts, references, or conclusions rather than indicating uncertainty.

Professional implication: Hallucinated content cannot be detected through a readability review. Substantive verification against source material is required wherever factual accuracy matters, and it is important to check the referenced source material, as AI can summarise to fit a desired outcome. Reliance on unverified AI output is professionally indefensible, regardless of how confident it appears.

Contextual and conceptual misunderstanding

AI systems recognise patterns but lack real-world understanding, struggling with context, causality, physical constraints, and nuances. Examples include inconsistent recommendations, misinterpreted lease structures, inappropriate assumptions, and a lack of irony or judgement. They often overlook time and sequence, such as not sequencing the evolution of legislation unless explicitly instructed.

Professional implication: Outputs that appear internally coherent may still be conceptually wrong. Professional experience and contextual knowledge remain essential to interpreting and, where necessary, rejecting AI-assisted outputs.

Data drift and temporal staleness

AI systems are trained on historical data and do not automatically adapt to changes in market conditions, regulation, or professional practice. Over time, models may continue to apply outdated patterns with confidence.

Unlike traditional software, AI systems rarely fail noisily. When inputs change, integrations break, or retrieval systems underperform, the model may continue producing outputs without indicating degradation or loss of context.

Professional implication: Strong past performance does not guarantee current reliability. For applications used repeatedly, professionals must remain alert to changing conditions and reassess whether AI outputs remain appropriate for current circumstances.

Silent failure

Unlike traditional software, AI systems rarely fail noisily. When inputs change, integrations break, or retrieval systems underperform, the model may continue producing outputs without indicating degradation or loss of context.

For example, when document retrieval is incomplete, a retrieval augmented AI system may generate outputs based on only a subset of relevant documents, without indicating that material information may be missing.

Professional implication: Absence of error messages is not evidence of reliability. Ongoing QA, sampling, and exception-based review are necessary when outputs cannot be verified individually.

Adversarial or unexpected Inputs

AI systems can behave unpredictably when exposed to unusual, manipulated, or edge case inputs.

While extreme adversarial attacks are uncommon in professional practice, more subtle forms occur routinely (e.g., poorly structured data, atypical documents, inconsistent terminology).

Professional implication: Systems should be used within their validated scope. Outputs generated from atypical inputs warrant heightened scrutiny and may justify reclassification to a higher governance tier.

Managing limitations

These limitations are real but manageable. The proportionality framework in Section 4 **aligns governance with risk**. The competence requirements in Section 5 **ensure that professionals understand their tools**. The verification protocols in Section 6 provide practical methods for **detecting AI errors before they affect client work**. Understanding AI's limitations is not a reason to avoid these tools; it is the foundation for using them confidently and effectively.

The less familiar a professional is with the underlying subject, the less able they may be to recognise a plausible but incorrect response. **AI literacy cannot substitute for the professional competence required to evaluate the work.**

4. PROPORTIONATE GOVERNANCE

Governance requirements should scale with the significance of AI's contribution to professional work. A professional using AI for formatting assistance requires different governance than one deploying automated valuation model components. Uniform frameworks either over-regulate low-risk applications, deterring beneficial use, or under-regulate high-risk applications to avoid impractical burdens. Neither outcome serves professionals or clients.

4.1 THE PROPORTIONALITY PRINCIPLE

The proportionality principle ensures that governance enables AI adoption by focusing effort where impact is greatest. Professionals can use AI confidently at lower tiers without bureaucratic drag; those working with higher-risk applications understand exactly what additional governance their use requires. This is not a framework of graduated restrictions but of graduated enablement.

4.2 THREE TIERS OF AI APPLICATION

This guidance establishes three tiers of AI application: incidental use, assisted practice, and embedded reliance. The tiers are defined not by the sophistication of the technology but by the nature of AI's contribution to professional work and, critically, by the nature and significance of the AI contribution, the professional's ability to verify or otherwise assure the output, and the potential consequences of error. The classification process should consider materiality, verifiability and consequence together. No single factor determines every case. Appendix B provides the structured assessment. A professional who carefully reviews an AI-generated document summary has reviewed AI output; a professional who checks that summary against the original document has verified it against source material.

Classification under this framework determines the appropriate SCSI governance response. It does not, by itself, determine whether the AI use has a material impact on service delivery for the purposes of the RICS Professional Standard. That determination should be made and recorded separately where the RICS standard applies.

4.3 INCIDENTAL USE

Incidental use covers AI-enabled activity that is peripheral to professional conclusions and ordinarily unlikely to have a material impact on delivery of the surveying service. In surveying practice, incidental use includes grammar and spell checking in report drafting, calendar and scheduling assistance, document formatting, quick reference queries where outputs are verified as a matter of course (such as checking a building regulation reference during site work, then confirming against the actual regulation), and translation assistance for correspondence where accuracy is subsequently confirmed.

Another area is the administrative uses or support of AI. For example, you might introduce an AI tool that assists you in prioritising emails for your immediate attention or in reviewing calls for tenders from a particular site, helping you to select the most relevant ones to review. However, although these applications may appear low risk, members must consider the information being processed. For example, emails may contain personal data relating to clients or tenants, while tender analysis may involve confidential commercial information. At this tier, no AI-specific project governance is ordinarily necessary, provided that data protection, confidentiality, organisational policy, and normal professional care are observed, and governance overhead remains minimal. The requirements are limited to basic data protection awareness when using external tools and general recognition that AI applications have limitations.

No AI-specific documentation is ordinarily necessary unless required by organisational policy, law, contract, or another applicable standard. Review usage at this level regularly to ensure that it does not creep up the material impact ladder.

4.4 ASSISTED PRACTICE

Assisted practice covers uses in which AI makes a substantive contribution to professional work, while an appropriately competent professional remains actively engaged and applies direct verification, professional assessment, or other assurance sufficient for the task and its potential consequences. Assisted practice may or may not have a material impact on service delivery. This depends on the nature and significance of the AI contribution, rather than on the classification alone. Where the applicable material-impact threshold is met, the relevant client communication and documentation requirements apply.

Assisted practice applications in surveying include: drafting assistance for reports, valuations, and client correspondence, in which the

professional verifies factual claims against source documents; comparable identification and initial analysis, in which the professional reviews the comparables themselves; and, research compilation, in which findings are verified against primary sources. For material factual extraction from a manageable document set, source checking of the relied-upon content will normally be expected. Sampling alone may not be sufficient where an unchecked item could materially affect the advice.

A central characteristic of assisted practice is that an appropriately competent professional remains close enough to the underlying evidence and work to assess the material output and stand over the resulting professional conclusion. Direct checking of relied-upon facts will normally form part of this assessment. Section 6 provides detailed guidance on what effective verification is required for different output types, including the critical distinction between checking that output reads well and confirming that it is accurate.

The boundary with embedded reliance depends principally on how confidence in the output is established. Where confidence rests substantially on direct professional assessment of the underlying evidence and material output, the use will generally be assisted practice. Where confidence rests substantially on system validation, sampling, monitoring or process controls, the use will generally be embedded reliance.

4.5 EMBEDDED RELIANCE

Embedded reliance applies where confidence in AI-enabled professional work depends substantially on the design, validation, governance or monitored performance of the system or process rather than on direct professional verification of each material output.

In surveying practice, embedded reliance applications include: automated valuation model components where individual comparable adjustments are not verified against source data; high-volume document processing where individual source verification is impractical (such as processing hundreds of lease abstracts for a portfolio acquisition); defect probability scoring from building survey imagery; and, automated extraction of key terms from large document sets.

For illustrative purposes, a surveyor uses an AI-enabled system to analyse several years of planning application decisions across a local authority area to identify factors associated with approvals, refusals and appeals. The volume of data and the complexity of the underlying correlations make it impracticable to verify every individual relationship or weighting used by the system. Instead, confidence is based on dataset validation, testing outputs against known decisions, professional review of identified trends, and ongoing monitoring of system performance. The resulting analysis is used to inform advice to a client about planning risks and factors likely to influence an application. This use would normally be classified as embedded reliance because confidence depends principally on system and process assurance rather than direct verification of every material output. Whether the AI analysis has a material impact on service delivery should be assessed separately in accordance with the applicable RICS requirements.

At this tier, direct verification of every material output is not reasonably practicable because of the scale, complexity or nature of the processing involved. Therefore, confidence derives principally from system validation, testing, sampling, exception review, monitoring, and professional oversight rather than from output-by-output verification. This demands rigorous vendor due diligence before adoption. Professionals and firms must understand:

Training data: What data was the system trained on? Is it relevant to the Irish market? How current is it? Does it include the property types and transaction types the professional will encounter?

Validation and accuracy: What accuracy has the vendor demonstrated, how is it measured, and in what contexts? Accuracy on US commercial property data tells you little about performance on Irish residential portfolios.

Limitations and failure modes: Where does the system perform poorly? What edge cases produce unreliable outputs (test against 3.5 limitations)? What inputs cause it to fail?

Vendor liability: What responsibility does the vendor accept if the system produces defective outputs? What are the contractual limitations on liability? Firms must interrogate vendors in writing and document responses. This is not a procedural formality: it is the foundation of confidence in system outputs that cannot otherwise be verified. Vendors who cannot or will not provide substantive answers to these questions present a material risk that must inform the adoption decision. Glossy marketing materials and generic accuracy claims are not adequate responses. Limited supplier information is a material risk factor. The firm should determine whether the available evidence is sufficient for the proposed use and should not proceed where it cannot establish an adequate basis for reliance. Appendix D provides a framework of questions to guide this inquiry.

Insurance notification: Before adopting a materially different AI-enabled method, firms should review their professional indemnity policy, applicable disclosure obligations, and guidance from their broker or insurer. If the policy requires notification or consent, this must be completed before use commences. The SCSI will continue to engage with its professional indemnity insurance (PII) partner on emerging

market practice. The insurance market is actively reconsidering coverage for AI-assisted professional services, and policy terms vary widely. Failure to disclose material changes in working methods could jeopardise coverage precisely when it is needed if AI-assisted work proves defective and a claim arises. Any notification or consent required by the applicable policy should be completed before the relevant use commences.

4.6 CLASSIFYING YOUR USE

Professionals should classify each distinct use by considering:

- What does the AI contribute?
- Does this contribution have a material impact on the service?
- What is the competence required to assess it?
- Can the material content be verified against authoritative evidence?
- What is the reliability and provenance of the underlying data?
- What is the consequence if the system is wrong, incomplete, or used outside its intended scope?

Where material outputs are directly checked against authoritative evidence and subjected to appropriate professional assessment, the application will generally be assisted practice. Where confidence depends substantially on system validation, sampling, monitoring or process controls because direct verification of each material output is not practical or proportionate, the application will generally be embedded reliance.

Classification should reflect the overall assurance approach and should not turn solely on whether every individual input or output has been checked. After determining the tier, separately assess and record whether the use is capable of materially influencing service delivery and whether any applicable RICS client communication or documentation requirements are triggered.

Agentic features do not automatically determine the tier. However, multi-step actions, limited visibility, or the capacity to affect records, communications, transactions, or decisions may increase the governance required. The fact that a human initiates the workflow does not, by itself, mean that the application remains assisted practice. Classification depends on the professional's ability to verify the substance of the AI's work rather than merely review the final output.

Consider a professional using AI to extract key lease terms across a portfolio of 200 properties for a client acquisition. Checking every extracted term against every lease is impractical; the AI is being used

TIER	WHAT IT ENABLES	KEY GOVERNANCE REQUIREMENTS
Incidental use (ordinarily unlikely to have material impact).	Routine productivity tasks without governance overhead – use freely, maintain awareness, move on.	Basic data protection awareness when using external tools; no specific documentation, verification protocols, or client disclosure required.
Assisted practice (assess whether the contribution is capable of materially influencing service delivery).	AI-assisted professional work – first drafts, comparable identification, document summarisation, research compilation.	Verification against source material; proportionate documentation in workflow records; where AI has a material impact on service delivery, apply the applicable RICS requirements.
Embedded reliance (carefully review, as may involve material impact, depending on the role and influence on service delivery – assess and document determination separately).	Analytical scale impossible through unassisted effort – portfolio-wide processing, probability scoring, bulk data extraction.	Proportionate supplier or system due diligence; documented validation and QA; sampling, monitoring and exception review where relevant; consideration of professional indemnity implications. Where the AI use has a material impact on service delivery, comply with the applicable RICS requirements, including advance written client communication and the required instruction-level records.

precisely because that manual review is not feasible. This is embedded reliance regardless of how competent the AI system appears.

Where a single workflow combines multiple AI applications, classify at the highest-tier component level. Appendix B provides a structured self-assessment to help professionals work through this classification.

4.7 GOVERNANCE EXPECTATIONS BY TIER

Governance obligations are cumulative: higher tiers include all obligations of lower tiers. Professionals operating at lower tiers should not burden themselves with governance designed for embedded reliance. Classification under the SCSI proportionality framework and determination of material impact are related but distinct assessments. The proportionality tier describes how confidence in AI outputs is established. Material impact concerns the significance of those outputs to the delivery of the surveying service.

4.8 DATA STEWARDSHIP ACROSS ALL TIERS

Data protection obligations apply regardless of the proportionality tier. A professional uploading client information to an AI system is processing data, and that processing carries consequences.

Consider what happens when a surveyor pastes a confidential rent review memorandum into a consumer AI chatbot to generate a summary. That memorandum, containing rental figures, negotiating positions, and tenant identities, has now been transmitted to an external system. Depending on the tool's terms of service, the content may be stored, reviewed by the provider's staff, or used to train future model versions.

Uploading confidential information to an unauthorised AI service may constitute a disclosure or processing activity that is inconsistent with confidentiality, contractual, data protection, or organisational requirements. Professionals must distinguish between enterprise deployments and consumer tools. Enterprise arrangements typically include contractual data-handling terms: prohibitions on using client data for model training, defined retention and deletion policies, and clear data-processing agreements. However, suitability should be determined by the actual service configuration, contractual terms, retention settings, access controls, processing locations, and approved organisational use. Product labels such as 'consumer' or 'enterprise' are useful indicators but are not substitutes for assessment.

The practical rule: Do not upload personal, confidential, privileged or commercially sensitive information to an AI service unless the proposed processing has been assessed and authorised as lawful, secure, contractually appropriate, and consistent with client and organisational requirements. Client agreement may be relevant, but does not by itself establish that a proposed use is permissible. GDPR obligations apply fully to AI-assisted processing. Where personal data is involved, professionals must ensure a lawful basis for processing, apply data minimisation principles, and observe restrictions on automated decision-making affecting individuals. Cross-border transfer considerations apply when using AI services hosted outside the EU.

4.9 WHEN CLASSIFICATION IS UNCERTAIN

If classification is uncertain, pause and document the factors considered, including materiality, verifiability and consequence. Seek appropriate advice where the distinction would materially alter the governance response. A precautionary higher-tier approach may be appropriate while uncertainty is resolved. Governance appropriate to embedded reliance will always satisfy the requirements of assisted practice; governance appropriate to assisted practice will satisfy incidental use requirements. A higher-tier approach may be appropriate while a material uncertainty is resolved. The objective should nevertheless remain proportionate governance, as unnecessary controls can create cost, complexity, and barriers to beneficial use.Uncertainty should prompt reflection, not permanent over-classification. Professionals should seek peer consultation, in line with SCSI and RICS guidance, to build confidence in their classification. The use of external experts should also be considered, depending on the intended use and associated risks. As experience with specific applications grows and verification practices mature, classification may be refined downward, always with documented reasoning for the determination. The framework is designed to be navigated, not to trap professionals at the highest tier indefinitely.

Practical rule for agentic AI: If an AI system is acting on your behalf across multiple steps, ensure that you can review what it did, what information it used, and what actions it performed. If you cannot understand or reconstruct the process, you should consider whether the system is suitable for professional use.

Uploading confidential information to an unauthorised AI service may constitute a disclosure or processing activity that is inconsistent with confidentiality, contractual, data protection, or organisational requirements.

5. COMPETENCE

Competence in AI-assisted practice has two components: competence in the underlying professional task and competence in the use of the AI system. AI literacy cannot compensate for an absence of the technical knowledge, judgement or experience needed to assess the work.

Effective AI use requires specific competence – not technical expertise in how systems function, but the practical understanding necessary to exercise professional judgement about AI-assisted work. This connects directly to Principle 2.5 (continuous competence) and Principle 2.6 (remain informed about relevant AI): **Members who use AI, govern its use or rely on AI-enabled information should develop competence proportionate to their role and the significance of the application**.

In summary, a **competent user** should be able to do the following:

- explain the **purpose** for which the AI is being used;
- recognise whether the task lies within the user's **professional competence**;
- identify the evidence against which the output should be **verified**;
- recognise when **additional support** of a specialist, supervisory or peer review nature is needed; and,
- exercise **critical judgement** to differentiate a well-presented answer from a reliable professional conclusion.

5.1 BASELINE AI LITERACY

Every professional using AI requires foundational competence, regardless of proportionality tier. This baseline enables confident use while maintaining the professional judgement clients rely upon.

What baseline competence looks like in practice

A competent professional can distinguish AI-suitable tasks from those requiring unassisted human judgement. They recognise that AI excels at pattern recognition across large datasets, consistent rule application, rapid information synthesis, and flagging items that warrant closer attention, but struggles with novel situations outside its training patterns, contextual judgement that requires local knowledge, and tasks that demand understanding the system does not possess.

A competent professional understands that generative AI produces fluent output, not reliable output. They treat AI-generated text with appropriate scepticism, recognising that confident-sounding content may be fabricated. They know to verify the substance against the source material rather than accepting a plausible-seeming output at face value.

A competent professional can identify when AI output warrants additional scrutiny: results that seem too convenient, conclusions that conflict with professional experience, outputs at the edge of the system's typical use. They investigate anomalies rather than accepting them.

A competent professional understands data implications. They distinguish enterprise deployments with contractual protections from consumer tools, where data handling is less controlled. They recognise that uploading client information to an AI system creates confidentiality or regulatory risk.

Members and their firms should not place less experienced staff in a position where AI substitutes for the supervision, practical experience or structured learning required to develop core professional competence.

Training should be role and use specific. A generic AI awareness session does not, by itself, establish competence to use AI in a particular professional service. The approach reflects a familiar professional principle: responsibilities should be allocated to persons who possess the knowledge, training, experience and authority necessary for the task.

Every professional using AI requires foundational competence, regardless of proportionality tier. This baseline enables confident use while maintaining the professional judgement clients rely upon.

5.2 ENHANCED COMPETENCE FOR EMBEDDED RELIANCE

Professionals working with embedded reliance applications require competence beyond the baseline. At this tier, confidence in outputs derives from an understanding of the system itself, rather than from individual output verification.

What enhanced competence looks like in practice

A competent professional at this tier can critically evaluate vendor claims. When a vendor claims 95% accuracy, they ask: accuracy measured how, on what data, for what task? They recognise that a system validated on London commercial property may perform quite differently on regional residential stock, and they probe until they understand what the accuracy claim actually means for their intended use.

A competent professional can conduct meaningful due diligence. They know what questions to ask about training data, validation methodology, and known limitations. They recognise warning signs (vague claims about "proprietary algorithms", reluctance to discuss training data, inability to specify failure modes) and understand that vendor opacity is itself a risk factor. Appendix D provides a framework for this inquiry.

A competent professional can design appropriate QA.

They determine sampling rates based on the stakes involved, define exception thresholds that trigger individual review, and establish protocols proportionate to the application at hand. They document their methodology so that it can be explained and defended.

Professionals working with embedded reliance applications require competence beyond the baseline. At this tier, confidence in outputs derives from an understanding of the system itself, rather than from individual output verification.

competent professional monitors system performance over time. They recognise that initial validation does not guarantee ongoing reliability, particularly as market conditions or data patterns shift. They maintain vigilance for degradation and know when to reassess.

5.3 MAINTAINING COMPETENCE AS TECHNOLOGY EVOLVES

AI competence is not a one-time acquisition. Systems available today may be superseded within months; new capabilities create new applications and new considerations.

This requirement integrates with existing CPD frameworks rather than sitting outside them. AI-related learning – understanding new capabilities, staying current with regulatory developments, deepening verification expertise – constitutes legitimate professional development. Professionals should include AI competence in CPD planning as they would any evolving area of practice (see Section 9.4).

5.4 FIRM RESPONSIBILITIES

Individual competence operates within an organisational context. The quality of AI outputs depends heavily on the quality, structure and governance of underlying data. Firms should not assume that adopting AI will compensate for poor information management. Data quality, record management and document governance remain foundational professional capabilities.

Firms bear collective responsibility for ensuring that AI use is appropriately governed, which requires maintaining sufficient expertise at firm level.

Firms should ensure that staff receive appropriate training before using AI in client work and maintain that competence through regular updates as tools and practices evolve.

This requires more than periodic formal training: firms should designate responsibility for monitoring AI developments relevant to their practice areas and disseminating pertinent information to staff. Clear policies identifying permitted applications at each proportionality tier, and oversight capability to ensure compliance, complete the organisational framework.

For embedded reliance applications, firm-level responsibility is paramount: adoption decisions should involve senior assessment and documented vendor due diligence before any professional relies on the system for client work.

This organisational investment enables confident adoption. Firms that establish clear governance and support ongoing development position themselves to capture AI's benefits effectively – serving both their professionals and their clients well.

6. ASSURANCE, VERIFICATION AND PROFESSIONAL JUDGEMENT

Before relying on an AI output, the professional should establish confidence through an appropriate combination of direct verification, professional assessment, and system or process assurance. The appropriate combination depends on the task, materiality, available evidence and potential consequences.

This principle applies across all three tiers of the proportionality framework: whether the application is incidental, assisted, or embedded, the professional must satisfy themselves that outputs are fit for purpose.

Direct verification: checking output against authoritative source material.

Professional assessment: applying expertise to reasoning, judgement and suitability.

System or process assurance: validation, testing, sampling, exception handling and monitoring.

6.1 THE VERIFICATION IMPERATIVE

What varies is how verification is accomplished. A surveyor using AI to check spelling in a client letter exercises verification by briefly reviewing the letter. A surveyor using AI to identify comparable transactions verifies by personally examining the comparables. A surveyor relying on AI-processed portfolio data, where individual source verification is impractical, verifies through systematic QA of the process. The principle is constant; its application scales with risk and context. Verification is what makes AI assistance professionally reliable.

The professional who verifies appropriately can adopt AI confidently; the professional who treats AI outputs as self-validating has not used a tool but abdicated a responsibility.

High Court requirements

The High Court Practice Direction HC142 applies to civil High Court proceedings and to court documents, including expert reports. It confirms that responsibility remains with the person producing the document and that AI-generated material must be independently verified. Verification by another AI tool alone is insufficient. Specific declarations apply to witness statements, affidavits and expert reports. Members acting as expert witnesses should review the Practice Direction and obtain appropriate legal instructions before using generative AI in connection with court documents. HC142 commenced on September 1, 2026, and covers parties, practitioners, witnesses, experts, and relevant court documents.

This is an example of an additional context-specific requirement. HC142 does not apply to all professional reports, but members involved in relevant High Court proceedings and court documents should comply with its terms.

6.2 VERIFICATION APPROACHES BY OUTPUT TYPE

Different outputs demand different verification methods. The appropriate approach depends on what the AI has produced and, critically, whether verification against source material remains practical.

Factual research requires source confirmation. When AI identifies comparable lettings, locates planning history, or retrieves lease terms, the professional confirms accuracy against primary sources. This need not mean duplicating the AI's work: if AI surfaces ten potentially comparable transactions, the professional reviews those ten against source records rather than independently re-searching the market. The question is whether the facts are accurate, not whether the professional could have found them unaided.

Analytical conclusions require professional assessment of reasoning and assumptions. AI might suggest that a property's rental value reflects particular locational factors, or that a building's condition warrants specific remediation. The professional evaluates the logic, tests the assumptions against professional experience, and exercises the contextual judgement that remains distinctively human.

Drafted content requires review for accuracy, appropriateness, and tone. An AI-generated schedule of conditions must correctly describe what was observed. Client advice must reflect the specific circumstances and relationship. The professional reviews not merely whether the text is well written, but also whether it is correct and suitable for the purpose.

Numerical outputs require validation against benchmarks or independent calculation. Yield calculations should be sense checked against market norms. Reinstatement estimates should align with the professional's experience. Critical figures warrant verification through independent computation where feasible.

If you cannot realistically check the AI's outputs against the original documents or data, you are relying on the system rather than verifying it. In this guidance, that means the use falls into embedded reliance. This is not a criticism; it is a classification decision with governance implications. Section 6.5 addresses verification for such applications.

The professional who verifies appropriately can adopt AI confidently; the professional who treats AI outputs as self-validating has not used a tool but abdicated a responsibility.

6.3 SYNTAX VERSUS SUBSTANCE

This distinction is essential for generative AI and warrants particular attention.

Syntactic verification confirms that output reads well: prose flows naturally, tone suits the purpose, formatting is correct. Generative AI excels here. A model can produce impeccably structured text, appropriate register, and polished presentation.

Substantive verification confirms that output is accurate: factual claims are true, contractual references are correct, figures are valid, nothing material has been invented or omitted. Generative AI provides no assurance here. As discussed in Section 3.4, these systems optimise for fluency, not factuality. Output can be syntactically flawless and substantively false. The practical implication is stark: reading AI-generated text and finding it well written tells you nothing about whether or not it is true. A market report might flow elegantly while overstating take-up figures. A building description might read professionally while inventing specification details. The professional who reviews for readability alone has checked syntax while ignoring substance. Effective verification addresses both dimensions as distinct activities. Confirm that the output reads appropriately, then, separately, confirm that it is accurate.

6.4 DOCUMENTATION APPROPRIATE TO TIER

Documentation requirements should follow the proportionality framework and integrate with existing file management, rather than creating parallel records.

Incidental use requires that no AI-specific documentation is ordinarily necessary unless required by organisational policy, law, contract or another applicable standard.

Assisted practice requires verification to be documented. Documentation should be proportionate and should ordinarily be integrated into existing project, quality and risk records. Where the RICS material-impact threshold is met, complete the records required by the RICS Professional Standard. Where AI has contributed meaningfully, the file should show that verification occurred, include a note confirming that comparables were checked against source data, or indicate that a draft report was reviewed against the underlying inspection record. This is professional file discipline applied to AI-assisted work, not additional bureaucracy.

Embedded reliance requires explicit documentation of QA processes and outcomes. Because individual source verification is typically impractical, records must demonstrate the systematic assurance applied: sampling methodology, sample review results, exception criteria, and how exceptions were handled.

This protects both client and professional when questions arise about the reliability of AI-assisted work. Where the RICS material-impact threshold is met, complete the records required by the RICS Professional Standard, including the applicable written reliability determination.

Where RICS Standards apply, **written reliability determinations are required**, even if sampling based. Review Appendix G for additional details.

6.5 QUALITY ASSURANCE FOR HIGH-VOLUME APPLICATIONS

Some valuable AI applications involve volumes that preclude individual output review, e.g., portfolio-wide lease abstraction, bulk condition screening, and large-scale comparable analysis.

Appropriate QA makes these applications viable; without it, professionals would face an impossible choice between abandoning AI assistance and abandoning verification.

Appropriate QA makes these applications viable; without it, professionals would face an impossible choice between abandoning AI assistance and abandoning verification.

Statistical sampling provides assurance through representative review. The professional selects outputs for detailed verification against source material.

Sample design should reflect the purpose of the assurance, population size and variability, known failure modes, materiality, confidence required, and consequences of undetected error. A percentage alone does not establish that a sample is adequate.

Automated consistency checks flag anomalies for human attention. Outputs falling outside expected parameters, showing internal inconsistencies, or diverging from historical patterns trigger individual scrutiny rather than passing through unexamined.

Exception-based review directs professional effort where it matters most. The professional establishes criteria (e.g., unusual values, flagged confidence scores, specific property characteristics) to identify outputs that require human examination. Verification focuses on exceptions rather than attempting comprehensive review.

An illustrative example: Consider the 200-lease portfolio acquisition from Section 4.6. The professional cannot verify every extracted term against every lease; that defeats the purpose of using AI. Instead, they design a QA approach:

- **Sample selection:** Select a lease sample proportionate to the size, variability and risk profile of the portfolio, together with all records flagged as unusual or low confidence. This may include a random sample for full verification alongside targeted review of records identified by the AI as requiring further scrutiny.
- **Verification protocol:** For sampled leases, check extracted rent, term, break clauses, and rent review provisions against the original documents. Record discrepancies.
- **Exception criteria:** Any lease where the AI reports unusual terms (rent-free periods exceeding 24 months, breaks exercisable on less than three months' notice, terms exceeding 25 years) receives individual review regardless of whether it was sampled.
- **Escalation criterion:** Define in advance the error pattern or threshold that will require expanded checking, investigation or suspension of reliance.
- **Documentation:** Record the sampling methodology, verification results, exceptions reviewed, and overall error rate. This becomes the evidential basis for confidence in the AI-assisted output.

The figures above demonstrate the structure of a QA plan and do not prescribe a suitable sample size or error threshold for every portfolio. The sampling plan should be established or reviewed by a person competent in the service, the dataset and the assurance method. The sampling methodology, consistency parameters, and exception criteria must be documented. This is the assurance framework; its design and results should be defensible if the work's reliability is later called into question.

7. CLIENT SERVICE AND TRANSPARENCY

Clear, proportionate communication helps clients understand how their service is being delivered and how professional responsibility is maintained.This creates competitive differentiation.

Sophisticated clients (e.g., institutional investors, corporate occupiers, and lenders conducting due diligence) are developing their own views on AI governance. A firm that can articulate its approach clearly, explain its verification processes, and demonstrate proportionate governance is offering something beyond the immediate service: confidence in how that service is produced.

Clients who receive evasive or defensive responses to AI questions will draw their own conclusions. Transparency, handled well, becomes a trust signal that distinguishes professionals who have thought seriously about AI governance from those who have not.

The proportionality framework helps to determine the appropriate approach to transparency, but classification alone does not determine whether formal client communication is required.

Where AI has a material impact on service delivery, members must comply with the applicable RICS client communication requirements. In other circumstances, communication should be proportionate to the significance of the AI contribution, contractual requirements, and the reasonable expectations of the client.

Where AI has a material impact on service delivery, comply with the applicable RICS client communication requirements.

Clear, proportionate communication helps clients understand how their service is being delivered and how professional responsibility is maintained. This creates competitive differentiation.

7.1 TERMS OF ENGAGEMENT AND REPORTING

Engagement letters and service agreements should address AI use in terms proportionate to the application tier.

Where AI use is material, disclosure should be made in advance and form part of the engagement terms. It should not be introduced after work has commenced. The final report should also include this information, which is particularly important when the report is used by third parties.

Where **embedded reliance** has a material impact on service delivery, the applicable RICS requirements for client communication must be met. A valuation engagement incorporating automated valuation model components should state this and explain how output quality is assured.

For **assisted practice** where formal disclosure is not otherwise required, proportionate general communication may nevertheless be appropriate.

This might read: "In delivering this engagement, we may use AI-assisted tools for research, analysis, or drafting. AI-assisted outputs are subject to professional review, verification or assurance appropriate to their role in the service.

Responsibility for the professional advice, conclusions and deliverables remains with this firm".

For **incidental use**, no specific contractual disclosure is required.

Appendix C provides template language adaptable to different service types and proportionality tiers.

7.2 EXPLAINING AI INVOLVEMENT APPROPRIATELY

Clients may ask how AI contributed to their work out of curiosity, due to governance requirements, or for reassurance.

The explanation should be accurate, proportionate, and focused on what matters to that client. An effective explanation addresses three elements:

- what the AI contributed;
- how the professional assured quality; and,
- what the client can rely upon.

A surveyor who used generative AI to draft report sections might explain: "I used AI to produce first drafts, which I reviewed and revised for accuracy. All factual statements were verified against my inspection notes and source documentation. The professional conclusions are my own".

A surveyor who used AI to identify comparables might say: "AI helped me to screen transactions to identify potentially relevant comparables. I reviewed each individually and selected those I judged appropriate".

Calibrate detail to the client's interest and avoid both dismissiveness and defensive over-explanation; the aim is to communicate competence and care.

7.3 CLIENT PREFERENCES AND CHOICES

Some clients will prefer services delivered without AI assistance. These preferences are legitimate and should be respected where feasible.

Client concerns typically involve data confidentiality, accuracy, or discomfort with AI-generated content. Where a client articulates specific concerns, address them directly. Often, an explanation of verification processes and data protection will provide adequate assurance.

Some services depend on AI-assisted processes that cannot be replicated manually at comparable cost or quality. Where a client's preference cannot be practicably accommodated, explain this honestly. The client can then decide whether to proceed or seek services elsewhere.

Where a client instructs that AI should not be used, document this in the engagement terms. Such instructions are binding and must be communicated to all staff involved.

"I used AI to produce first drafts, which I reviewed and revised for accuracy. All factual statements were verified against my inspection notes and source documentation. The professional conclusions are my own".

8. REGULATORY AND LIABILITY CONTEXT

This guidance supplements rather than replaces existing professional standards. AI-assisted practice must comply with all applicable SCSI requirements for the relevant service type.

Where SCSI standards prescribe specific methodologies, verification requirements, or documentation, AI tools must operate within those constraints.

The proportionality framework helps professionals to calibrate AI governance; it does not modify substantive professional obligations. Therefore, approach AI usage via the following hierarchy:

- applicable legislation and court requirements – legal;
- SCSI/RICS Rules of Conduct and Professional Standards – ethical;
- Professional Group-specific standards and guidance – professional;
- SCSI guidance and implementation resources – technical; and,
- firm policy and client contractual obligations – internal.

Where two requirements apply, the member should comply with both. Where requirements conflict or their application is uncertain, obtain appropriate professional, regulatory or legal advice.

Professionals working across Irish and UK jurisdictions should note that the RICS has published separate AI guidance. The core principles, professional accountability, proportionate governance, and verification of outputs align.

Differences in emphasis and specific requirements exist. Where work spans both jurisdictions, professionals should satisfy the applicable standards in each.

8.1 EU AI ACT: SURVEYING IN CONTEXT

The EU AI Act classifies obligations primarily by the nature and intended purpose of the AI system and the role of the organisation using or providing it. Members should not assume classification solely from the professional discipline or from the fact that an application appears routine. Most ordinary productivity uses are unlikely to attract the Act's high-risk obligations, but individual applications should be assessed where they affect persons, access to services, safety, or other regulated contexts.

Risk-based approach

The EU AI Act applies different obligations depending on the level of risk associated with the application. Most routine productivity tools used for drafting, research, note-taking, information management and similar administrative activities will generally fall outside the highest-risk categories. However, applications that influence decisions affecting individuals, access to services, safety or legal rights require closer consideration.

Human oversight

Where AI contributes to professional work, appropriate human oversight should remain in place. Professionals remain responsible for understanding how AI outputs are used, reviewing significant outputs, and exercising their own judgement rather than simply accepting automated recommendations.

Transparency

In some circumstances, organisations may be required to disclose the use of AI systems or explain how AI contributes to decision-making processes. Members should consider whether AI involvement is material to the service being delivered and whether additional disclosure obligations apply.

Transparency and labelling of AI-generated content

The EU AI Act introduces requirements to ensure that certain AI-generated content is clearly identified, helping people to distinguish between genuine and artificially created or manipulated material. Not all content prepared with AI assistance needs to be labelled. The requirements depend on the nature of the content, how it is used, and the circumstances in which it is published. Under Article 50 of the Act, these requirements include:

- images, audio and video: AI-generated or manipulated content that constitutes a deepfake must be disclosed;
- published text: AI-generated text published to inform the public on matters of public interest may require disclosure, unless it has

undergone human review or editorial control, and someone takes editorial responsibility for its publication; and,

- AI interactions: people must be informed when they are interacting directly with certain AI systems, unless this is already obvious.

Transparency is particularly important when using AI-generated or enhanced images in property marketing. For example, virtual staging, digitally altered property photographs, or AI-generated development images should be clearly presented so that prospective purchasers or tenants are not misled about a property's actual condition or appearance.

For licensed property services providers, this is also consistent with existing obligations under the Property Services (Regulation) Act 2011 (Minimum Standards) Regulations 2020. Regulation 10(2) prohibits PSRA licensees from knowingly producing, publishing or circulating misleading information about property advertised for auction, sale or letting. Members should ensure that AI-generated or altered material is accurate, appropriately identified where required, and does not mislead clients or the public.

The European Commission provides further information on these requirements in its voluntary Code of Practice on Transparency of AI-Generated Content.

Accuracy, reliability and monitoring

Where AI contributes materially to a service, organisations should be able to demonstrate that outputs are sufficiently reliable for their intended purpose. This may require validation, testing, sampling, monitoring or other assurance processes, particularly where direct verification of every output is impractical.

Data governance

Many AI applications depend on large volumes of data. Organisations should understand the provenance, quality, relevance and suitability of data used by AI systems. Poor-quality data can lead to unreliable outputs regardless of the sophistication of the underlying model.

Record keeping and documentation

Some AI applications, particularly those involving material reliance or regulated use cases, may require documented assessments, validation records, governance controls or other evidence demonstrating that the system is being used appropriately.

Professional responsibility

The use of AI does not diminish professional obligations. Members remain responsible for the advice, conclusions and services delivered to clients, regardless of whether AI systems contributed to the work.

The principles contained within this guidance have been designed to align broadly with the objectives of the EU AI Act. However, where the Act applies, its requirements take precedence, and members must ensure compliance with all applicable legal obligations.

Applications requiring particular attention

Certain applications warrant closer attention to regulatory classification.

Tenant screening, affordability assessment and allocation decisions

Property management and housing applications that assess prospective tenants' suitability, affordability, creditworthiness or priority for access to accommodation may attract additional legal and regulatory obligations. AI used in such decisions requires particular scrutiny, as it may influence individual outcomes.

Automated decision-making affecting individuals

Any AI application that materially influences decisions affecting individuals requires careful consideration under both the EU AI Act and the GDPR restrictions on automated decision-making. Examples may include tenant screening, affordability assessments, housing allocation decisions, or other applications that may affect a person's access to accommodation, services, or opportunities.

Safety-critical applications

AI systems used to support decisions relating to building safety, construction safety, asset integrity, infrastructure management or project risk should be subject to heightened scrutiny. Where incorrect outputs could contribute to physical harm, safety failures or significant project risks, additional validation, oversight and assurance may be required.

For applications in these categories, professionals should take three steps: first, determine whether the AI Act's high-risk provisions apply; second, if they do, ensure compliance with the relevant requirements; and third, where classification is uncertain, seek specialist advice before deployment.

8.2 DATA PROTECTION ESSENTIALS

The GDPR fully applies to AI-assisted processing of personal data. Several provisions warrant particular attention in surveying contexts.

Lawful basis

Processing personal data through AI systems requires the same lawful basis as any other processing. A lawful basis must be identified for the relevant processing. The appropriate basis depends on the specific purpose, relationship, data and legal context.

Data minimisation

Upload only the personal data necessary for the task. A lease analysis requiring rent and term details does not require tenant contact information to be processed through AI systems.

Automated decision-making

GDPR Article 22 restricts decisions based solely on automated processing that produce legal or similarly significant effects on individuals. The involvement of a person does not necessarily prevent a decision from being regarded as solely automated if the human review is nominal or does not have genuine authority to alter the outcome. Obtain specialist advice where AI materially contributes to decisions producing legal or similarly significant effects.

Cross-border transfers

When AI services process data outside the EU, appropriate transfer mechanisms must be in place. Enterprise deployments typically address this contractually; consumer AI tools may not. Professionals should understand where their AI providers process data and verify that appropriate safeguards are in place.

Data protection impact assessment

Consider whether a data protection impact assessment is required, particularly where processing involves systematic evaluation, sensitive data, large-scale monitoring or decisions significantly affecting individuals.

8.3 FIRM POLICIES OR CONTRACTUAL OBLIGATIONS

Firm-level policies are an important support for professionals. They may set out an organisation's approach to AI, identify approved systems and uses, establish additional governance requirements, and provide guidance on training, data handling and oversight. Members should ensure that their use of AI is consistent with these policies, the RICS Professional Standard, and any other applicable legal, regulatory or organisational requirements.

For example, SCSI members working within Government departments, local authorities, State agencies or other public service bodies should also consider applicable public sector AI policies and governance requirements. In Ireland, the Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation published guidance in 2025 on the responsible use of AI in the public service built around seven principles:

- human agency and oversight;
- technical robustness and safety;
- privacy and data governance;
- transparency;
- diversity, non-discrimination and fairness;
- societal and environmental well-being; and,
- accountability.

These principles align closely with the approach set out in this guidance and may apply in addition to the obligations discussed in this document. Public sector members should ensure that they understand any organisation-specific requirements that govern the use of AI within their own bodies.

Members should also consider contractual obligations arising from client instructions, engagement terms, procurement requirements and service agreements. Where contracts require specific disclosures, restrictions, approval processes or limitations relating to AI, these requirements should be identified and addressed before deployment. In some circumstances, professionals may need to seek clarification regarding the data sources, AI systems, methodologies or governance controls that a client wishes to use or requires to be applied.

8.4 PROFESSIONAL LIABILITY AND INSURANCE

Members (or their firms) should review policy terms, proposal disclosures, conditions, exclusions and notification requirements relevant to changes in working methods or technology. Where policy terms, broker advice or insurer requirements call for notification, approval or additional information, those requirements must be followed. The SCSI is engaging with its professional indemnity partner to understand developing insurer expectations and will update member support accordingly.

Before materially changing a firm's working methods through AI, the firm should establish whether its policy terms, proposal disclosures, broker guidance or insurer requirements call for notification, consent or additional information. Any applicable requirement must be completed before the relevant use commences.

The SCSI will continue to engage with its professional indemnity partner and provide further member information as insurer expectations and market practice develop.

This conversation is straightforward to have now and considerably harder to have after a claim arises. Professionals adopting embedded reliance applications should treat insurance notification as a prerequisite, not an afterthought.

9. OPPORTUNITY AND RESPONSIBILITY

The preceding sections have addressed how to govern the responsible use of AI. This concluding section addresses why that effort is worthwhile.

AI-assisted practice is not a speculative future; it is a present reality for surveyors who have integrated these tools into their work. A valuation surveyor can interrogate comparable evidence across a dataset that would take weeks to analyse manually, with the AI identifying patterns in lease terms or transaction circumstances that inform professional judgement. A building surveyor can systematically process photographic records, flagging potential defects for expert assessment rather than relying solely on sequential human review. A property manager can maintain consistency across hundreds of service charge reconciliations, applying the same rigour to every calculation. **In each case, the professional's expertise remains central; AI extends its reach.**

These capabilities translate directly to client value. Analysis that was previously impractical becomes routine. Research that was constrained by time may cover a broader range of relevant material. Turnaround times may improve where quality, verification and professional review are maintained. Professionals can offer depth and consistency of service that would be economically unviable through unassisted human effort alone.

9.1 QUALITY, CONSISTENCY, AND CAPABILITY

The professional case for AI extends beyond efficiency. Appropriately governed AI assistance can help professionals to achieve standards that would be difficult to sustain through human effort alone.

Consider the demands of rigorous professional practice: systematic analysis that considers all relevant factors; comprehensive, comparable research; consistent methodology applied across every instruction; and, documentation that fully records reasoning and supports conclusions. These standards are what clients deserve and what professional obligation requires. They are also demanding to maintain under time pressure, across high volumes of work, and over the course of a career.

AI does not replace the professional skill required to meet these standards, the judgement to identify what matters, the experience to interpret marginal cases, or the responsibility to stand behind conclusions. What it provides is capacity: the ability to apply professional skill more systematically, across more data, to more demanding timescales, with greater consistency than unassisted human effort can sustain.

9.2 RESPONSIBLE ADOPTION AS PROFESSIONAL COMMITMENT

Responsible AI use protects not only individual instructions but the reputation of the profession. Clients, courts, lenders, public authorities, and the wider market rely upon the independence, accountability, and judgement of Chartered Surveyors. The continued value of professional advice depends upon maintaining that trust even as AI becomes more capable.

Developing sufficient awareness to evaluate relevant AI tools is increasingly important. Members and firms should be able to make an informed decision about whether, where and how AI can support their services. Responsible adoption may create significant benefits, but non-use of AI is not, by itself, a failure of professional competence.

The governance framework set out in this guidance is designed to enable such adoption. Consider what ungoverned AI use would mean in practice: outputs relied upon without verification, tools adopted without understanding their limitations, clients uninformed about methods used on their behalf. Such use would be professionally indefensible, and the risk of it is precisely what makes some professionals hesitant to engage with AI at all.

Proportionate governance supports confident adoption by concentrating attention where it is most needed. Incidental use requires only basic awareness. Assisted practice requires verification against source material and appropriate transparency. Embedded reliance requires comprehensive governance, including vendor due diligence and documented QA. At each tier, the governance requirement is matched to the risk, rigorous enough to ensure quality, and calibrated to avoid impeding beneficial use. **Governance does not constrain confident adoption; it is what makes confidence possible.**

The market context reinforces this obligation. Client expectations are evolving. Competitors are developing AI-assisted capabilities. Firms

that do not engage thoughtfully with these tools will increasingly find themselves at a disadvantage, unable to match the analytical depth, responsiveness, and value that AI-assisted practice enables. The question for each professional and firm is how to assess AI developments, and whether particular applications can support their services without compromising professional standards.

9.3 TRAINING

AI competence, like governance, should scale with how a member actually uses AI. Apply the context of Section 5, which sets out what competence looks like at each tier and how the SCSI supports members in reaching it. AI competence increasingly includes data literacy, understanding system limitations, critical evaluation of AI outputs, and awareness of the governance obligations associated with AI-assisted work.

A single annual CPD session, however well delivered, cannot build the judgement this guidance requires. Members need a structured, progressive pathway, and the means to demonstrate what they have learned, not simply attendance at a session. This is essential for their professional competence. Training and professional development should reflect the proportionality framework, with the level of knowledge and competence required appropriate to the risks associated with AI use. However, it is worth reiterating:

Professional expertise and judgement are prerequisites to AI learning and build on the technical knowledge, practical experience and professional judgement required for the underlying service. Completion of AI training does not qualify a member to undertake work outside the member's existing competence.

The SCSI's suggested approach to AI training follows the same logic as the governance framework in Section 4. Training is matched to risk and use, not applied uniformly. Three stages build on one another:

Foundation establishes the baseline knowledge expected where a member uses AI in a way that may influence professional work, regardless of how they intend to use it: recognising what AI is and is not, understanding why generative systems can produce fluent but fabricated output, and applying the proportionality framework in Section 4 to classify their own use correctly. This stage is knowledge based and is best delivered through a short, self-paced module, tested through applied scenarios of the kind in Appendix B rather than through passive completion alone.

Professional expertise and judgement are prerequisites to AI learning and build on the technical knowledge, practical experience and professional judgement required for the underlying service. Completion of AI training does not qualify a member to undertake work outside the member's existing competence.

STAGE	APPLIES TO	FOCUS	FORMAT AND EVIDENCE
Foundation	All members using AI, at any tier.	Recognising AI, hallucination risk, correct tier classification (Section 4).	Self-paced module, applied scenario assessment.
Applied	Members in assisted practice.	Discipline-specific verification and workflow integration (Section 5.1).	Facilitated, discipline-based workshop, completed worked exercise.
Advanced	Embedded reliance users, firm AI governance leads.	Vendor due diligence, QA design, PI and disclosure implications (Sections 5.2, 7, 8.4)	Case-based workshop, documented QA design exercise.

Applied competence builds the capability described in Section 5.1: verifying outputs against source material, recognising when results warrant closer scrutiny, and integrating AI into professional workflow without displacing judgement. Verification looks different across disciplines, so this stage works best delivered discipline by discipline, using real scenarios of the kind set out in Appendix F, rather than through generic instruction. A valuation surveyor and a building surveyor are developing the same underlying competence, but the material they practice it on should reflect their own work.

Advanced competence corresponds to Section 5.2 and applies to professionals working with embedded reliance applications, and to those holding AI governance responsibility within a firm (see Appendix H). This stage covers vendor due diligence, QA design, and the professional indemnity and disclosure implications addressed in Sections 7 and 8.4. Given the stakes involved, facilitated, case-based workshops are more appropriate here than self-paced material, supported by structured peer discussion of what has worked and what has not.

Ongoing development, not a single event

Section 5.3 already establishes that AI competence is not a one-time acquisition; the delivery model should honour that rather than treating training as an annual box to tick. The SCSI will support ongoing development through short, regular updates addressing emerging tools and regulatory developments, and through the peer learning community already established for members actively using AI in practice. This community is where practical, discipline-specific experience travels fastest, and members are encouraged to take part whether they are just starting out or well advanced in their use of AI.

Recording and demonstrating competence

Completion at each stage should be recorded against CPD points through the SCSI's usual channels, giving members a record they can point to. This record has value beyond CPD compliance: Section 8.4 requires professionals moving into embedded reliance to notify their PI insurer of AI-assisted work, and a documented training record supports that notification. Section 7 requires professionals to explain their approach to the use of AI to clients; a member who has completed the applied stage in their own discipline is better placed to do so credibly.

Firms carry a parallel obligation under Section 5.4 to ensure that staff are appropriately trained before using AI in client work. Firms should treat the pathway above as the practical basis for that training plan rather than building an equivalent independently, and should record which stage each member of staff has reached as part of normal practice management.

9.4 LOOKING FORWARD

AI capabilities will continue to advance. Regulatory frameworks will mature. Professional practice will adapt. This guidance will be reviewed and updated to reflect that evolution.

The SCSI recognises that navigating this transition requires effort: developing new competencies, adapting workflows, making considered tool selections, and maintaining governance as technology changes. These demands are real. The institution is committed to supporting members through this process, including through professional development resources that address AI competence requirements.

The SCSI also encourages members to contribute actively to the profession's collective navigation of AI integration. Practical experience of what works, and what does not, across different surveying disciplines will inform future iterations of this guidance. The profession's response to AI will be shaped by professionals who adopt thoughtfully, govern responsibly, and share what they learn.

The opportunity is substantial. The professional obligation is clear. This guidance provides the framework for meeting both.

The SCSI recognises that navigating this transition requires effort: developing new competencies, adapting workflows, making considered tool selections, and maintaining governance as technology changes. These demands are real.

APPENDICES

10. APPENDIX A: GLOSSARY

Terms are defined as used in this guidance, grounded in surveying practice.

Agentic AI: Artificial intelligence systems that can plan, decide and carry out tasks towards an objective with limited human intervention. Unlike generative AI, which simply responds to a prompt, they may retrieve information, use software (i.e., invoke tools), take multi-step actions, and adapt based on the results. Examples include systems that autonomously review portfolios, gather data, prepare reports, respond to emails, schedule actions, monitor assets, or co-ordinate workflows. The principles of this guidance still apply: professional judgement, accountability, verification, transparency, and proportionality.

Artificial intelligence (AI): Computer systems that learn from data, recognise patterns, generate content, or make predictions. For the purposes of this guidance, AI includes machine learning tools, automated analysis systems, and generative models. Conventional software performing fixed calculations (e.g., spreadsheets, CAD systems, standard databases) falls outside this definition unless it incorporates learning or generative capabilities.

Authoritative source: The professional's consideration of information, records, documents, measurements, observations, datasets, or other evidence as reliable and appropriate for the purpose of the service. Examples may include leases, transaction records, survey data, inspection findings, statutory records, measurement data, client information, contractual documents, and recognised professional standards.

Assisted practice: The middle tier of the proportionality framework. AI contributes meaningfully to professional work, while the professional verifies or assesses the outputs against the underlying evidence, records, observations or data. The professional uses AI to assist analysis but maintains independent understanding of the underlying matter.

Consumer AI: A publicly available AI service offered under consumer or individual terms. Data handling, retention, model training, and administrative controls vary by provider and service tier. Confidential, personal or commercially sensitive information should not be processed unless the use has been formally assessed and authorised.

Data provenance: The origin, history, ownership and movement of data, including how it was collected, processed, amended and transferred. Understanding data provenance helps professionals to assess reliability, quality, and suitability for use.

Direct verification: Confirming AI-generated information against the underlying evidence, records, documents, measurements, observations or datasets on which the professional conclusion relies, rather than relying solely on whether the AI output appears reasonable.

Disclosure: Depending on the nature of the instruction, disclosure communications may occur through engagement letters, reports, methodologies, project execution plans, procurement documentation, client briefings, tender submissions, or other project-specific communications. Therefore, disclosure is not limited to engagement terms.

Embedded reliance: The highest tier of the proportionality framework. Confidence in AI-enabled professional work relies primarily on system validation, governance, testing, monitoring or assurance, rather than direct verification of every material output.

Enterprise AI: An AI service licensed, configured or managed for organisational use and supported by contractual, security, access, retention and data-processing controls. The level of protection depends on the provider, product, configuration and organisational arrangements, and should be verified for the proposed use.

Generative AI (Gen AI): AI systems that create new content, such as text, spreadsheets, or images, based on patterns in their training data. These systems optimise for plausible, coherent output rather than factual accuracy. Most conversational AI tools use generative AI.

GeoAI: The application of AI to geographic, spatial, mapping, positioning, measurement or geospatial data. Examples include processing imagery, point clouds, GIS datasets, remote sensing information and location-based data. GeoAI may involve additional considerations relating to spatial accuracy, measurement uncertainty, co-ordinate reference systems, provenance, metadata and applicable measurement standards. Details available at https://opengeoai.org/.

Human oversight/human in the loop: Meaningful involvement by an appropriately competent professional in reviewing, assessing, challenging and, where necessary, correcting AI outputs or decisions. Human oversight requires more than simply accepting a result; the professional must remain capable of understanding the task, recognising limitations or errors, and exercising professional judgement.

Incidental use: The lowest tier of the proportionality framework. AI use that is peripheral to professional conclusions and unlikely to have a material impact on the surveying service. Normal professional, data and organisational responsibilities continue to apply.

Large language model (LLM): A type of AI model trained on large amounts of text that can understand and generate human-like language. Used to power many current AI assistants and chatbots.

Material impact: An AI output has a material impact where it is capable of influencing the delivery of a surveying service, professional judgement, advice, recommendation, decision, report, valuation, or other professional outcome. Materiality depends on the nature of the AI contribution and the significance of its influence on the service.

Measurement uncertainty: The range within which a measured or derived value may reasonably vary because of limitations in data collection, observation, instrumentation, methodology, processing or interpretation. AI analysis does not remove the need to understand and account for measurement uncertainty.

Multimodal AI or general AI model: This type of AI can simultaneously process a wide range of data types (text, images, audio, video, etc.). Many early AI models tended to be unimodal, capable only of handling text, for example.

Professional assessment: The application of professional knowledge, experience, judgement and scepticism to determine whether an AI output is appropriate, reliable, complete and fit for purpose. Professional assessment extends beyond factual checking and includes consideration of context, assumptions, limitations and consequences.

Small language models (SLMs): These are built with fewer parameters and simpler neural architectures than LLMs. The smaller size has trade-offs. Their focus on a small set of parameters means faster training, reduced energy consumption, and local deployment on site or in the device itself. However, SLMs' limited capacity means that they are currently less able to perform tasks involving complex language and have reduced accuracy on such tasks. SLMs can be coupled with LLMs; for example, in CCTV, they monitor for anomalies, escalate to an LLM for review, and then alert a human supervisor.

Substantive verification: Confirming that an AI output is accurate in substance, including factual accuracy, completeness, calculations, assumptions, references and professional conclusions, rather than merely checking that it appears plausible or well written.

System or process assurance: The controls, testing, validation, monitoring, sampling, governance and QA measures used to establish confidence in an AI-enabled process where direct verification of every output is impractical. Confidence is derived from the overall reliability of the system and supporting controls rather than from checking each individual output.

11. APPENDIX B: PROPORTIONALITY SELF-ASSESSMENT

This assessment helps professionals to classify AI applications within the three-tier framework. The three questions used in the quick reference provide a simple professional judgement test for everyday use. The questions below expand on those questions to create a structured process that supports more formal classification and governance decisions.

Seven questions to ask yourself before using AI in a new way in your professional work:

What is the scope of AI work?

Step 1: Identify the use – What does the AI do, and what information or action does it affect?

Is this material?

Step 2: Consider material impact – Could the AI output materially influence the service, professional conclusion, deliverable, or opinion? Keep this in mind as you work through the questions below.

How is AI being used?

Step 3: Assess professional competence – Is the professional competent in the underlying task and able to identify an inappropriate or unreliable output?

Step 4: Assess verifiability – Can material facts, calculations, measurements or interpretations be checked against authoritative sources, professional observations or validated data?

Step 5: Assess consequence – What could happen if the AI output is incomplete, inaccurate, biased, or used outside its intended purpose?

Step 6: Assess scale and reliance – Can material outputs be checked directly, or does confidence depend substantially on system validation, sampling or process controls?

Record findings and meet any necessary actions.

Step 7: Determine tier and response – Classify the use (determine the tier and whether there is a material impact) and apply the appropriate requirements. Record how any resulting requirements have been met, particularly where the RICS Professional Standard applies.

For example, AI-assisted lease summarisation could constitute incidental use, assisted practice or embedded reliance, depending on how the summary is used, its significance to the professional service, and how confidence in its material content is established.

WORKED EXAMPLES

Example 1: Building survey report drafting

A surveyor uses AI to draft standard paragraphs describing common defects observed during inspection. The surveyor reviews each paragraph, checks descriptions against their site notes and photographs, and revises as necessary. The AI also draws from a list of remediation suggestions prepared and approved by the surveyor.

Classification: Assisted practice. The AI accelerates drafting, while the surveyor verifies the material content against their own observations, and records and applies professional judgement to the recommendations.

Verification required: Material descriptions and recommendations are checked against the surveyor's inspection findings, supporting records, and professional judgement before being incorporated into the report.

Example 2: Comparable transaction search

A surveyor uses AI to identify potentially relevant sales comparables from a transaction database. The AI suggests 15 transactions. The surveyor reviews each one, examining the source records to assess relevance, and selects seven for the valuation.

Classification: Assisted practice. The AI expands the search; the surveyor exercises judgement on each comparable with reference to source data.

Verification required: The surveyor would review AI-generated summaries of comparables against the underlying transaction records.

Example 3: Portfolio lease review under time pressure

A fund acquisition requires reviewing 93 commercial leases within two weeks. The surveyor uses AI to extract key terms and flag unusual provisions. Given the timeline, the surveyor reads 20 leases in full and relies on AI summaries for the remainder, spot-checking where the AI flags anomalies.

Classification: Embedded reliance. Verification against the underlying evidence is partial; the surveyor relies on AI processing for the majority of documents.

Governance implications: This application requires governance appropriate to embedded reliance: a validated AI system, a documented QA process, explicit client disclosure, and consideration of professional

indemnity implications. Material impact should be assessed separately. Where the applicable threshold is met, the relevant client communication and documentation requirements apply.

Example 4: Using ChatGPT to explain unfamiliar concepts

A surveyor encounters an unfamiliar lease structure and asks ChatGPT to explain how turnover rent mechanisms typically work. The surveyor then reads the specific lease provisions and relevant guidance before advising the client.

Classification: Incidental use. The AI provides background education; the professional work relies on the surveyor's own reading of authoritative sources.

Verification required: The surveyor should not rely on ChatGPT's explanation of the *specific* lease terms without confirming by reading them in the lease.

When classification is uncertain

Where uncertainty could materially affect the governance response, adopt a precautionary approach while obtaining appropriate advice. Record the reasoning and revisit the classification as the use, evidence and controls become clearer.

12. APPENDIX C: CLIENT DISCLOSURE TEMPLATES

These templates are divided into:

A. **Communication required where applicable professional, contractual or legal requirements are triggered; and**

B. **Optional or recommended communication where AI has a lesser but still relevant role in the service.**

The level of detail should reflect the role AI plays, the materiality of its contribution, the terms of engagement, and the reasonable expectations of the client. Disclosure must not be generic or implied. It must be explicit, intelligible, and proportionate to the role AI plays in the service. Disclosure is not limited to engagement terms. Depending on the nature of the instruction, communication may occur through engagement letters, reports, methodologies, project execution plans, procurement documentation, client briefings, tender submissions, or other project-specific communications. At a minimum, disclosure must explain:

- if AI will be used in delivering the service;
- if parts of the service involve AI;
- that AI outputs are reviewed, verified, or assured;
- whether and how the client may raise concerns, object, or seek clarification; and,
- how the client may seek redress if they believe that they have been adversely affected.

Where AI use is integral to the service and cannot reasonably be excluded without affecting scope, quality, cost, or timescale, this must be made clear to the client before instructions are confirmed.

ENGAGEMENT LETTER PROVISIONS

Standard clause (suitable for all firms):

In delivering the services, [Firm Name] may use artificial intelligence (AI) tools to support research, analysis, drafting, data processing, or quality assurance.

AI tools are used to enhance efficiency and consistency. All AI assisted outputs are subject to professional review and verification, and responsibility for the advice, conclusions, and deliverables remains with [Firm Name].

AI is used in the following aspects of the services:
[describe specific activities, e.g., document review, data analysis, drafting support].

Where AI contributes materially to the services, [Firm Name] applies documented assurance processes to assess the reliability of AI outputs before reliance.

If you have concerns regarding the use of AI or wish to discuss limitations on its use, you should notify us as soon as practicable. Where AI use is integral to the services, we will explain the implications of any requested limitation. We apply the SCSI's professional guidance regarding the responsible use of AI.

If you believe you have been adversely affected by the use of AI in the delivery of the services, concerns may be raised in accordance with our complaints handling procedure, details of which are available at [reference].

For embedded reliance applications:

This engagement involves [describe, e.g., "AI-assisted analysis of the lease portfolio"/"automated processing of comparable transaction data"]. We use [describe system or approach] to [describe function], with quality assurance through [describe, e.g., "statistical sampling and professional review of flagged items"/"validation against known benchmarks"]. This approach enables [describe benefit, e.g., "comprehensive coverage within your timeline"/"consistency across the portfolio analysis"]. The professional conclusions are ours. Please let us know if you would like to discuss this approach or explore alternatives.

Handling client questions

Clients who ask about AI use often have underlying concerns: accuracy, value for money, or data confidentiality. Address the concern, not just the question.

"Did you use AI for this work?"

Yes – we used [describe] to [describe function]. This helped us [describe benefit]. All outputs were verified [describe how], and the conclusions reflect our professional judgement. Is there something specific you'd like me to explain about how we approached this?

"I'm not comfortable with AI being used on my instruction."

I understand. Can you help me understand your concern? [Listen.] We use AI where it genuinely improves our work, and we maintain professional responsibility throughout. If you'd prefer we limit AI use, we can discuss what that would mean for [scope/timing/approach]. For some applications, alternatives are straightforward; for others, there may be implications we should talk through.

"Am I paying for work done by a computer?"

Our fees reflect the professional service we deliver, including the judgement, expertise, and responsibility we bring. AI helps us to work more efficiently on some tasks, which can mean broader coverage or faster turnaround rather than simply lower cost. The professional analysis and the accountability for it remain with us.

Report disclosure (embedded reliance)

Methodology note: This analysis incorporates AI-assisted processing of [describe]. Quality assurance included [describe]. Professional conclusions reflect our judgement applied to these outputs.

Guide to internal AI contest and review mechanism (internal AI concern and review mechanism)

Firms should adapt this template to applicable RICS requirements, their complaints procedure, organisational structure and the significance of their AI use.

The organisations should maintain an internal mechanism for raising, reviewing, and addressing AI-related concerns. An illustrative internal review mechanism is set out below. At a minimum, this mechanism should include:

1. Clear trigger points

Clients (or internal staff) may trigger a review where:

- AI use was not disclosed as required;
- AI assisted output materially influenced advice or conclusions (not previously disclosed);
- client believes AI use led to error, bias, or unfair outcome; or,
- clients are objecting to the use of AI in principle for their instruction.

2. Named responsibility

A designated role (e.g., AI Governance Lead/Risk Partner/Compliance Officer) is responsible for:

- receiving AI related concerns;
- co-ordinating the review; and,
- ensuring independence from the original delivery team where appropriate.

3. Review scope

The review should consider:

- whether AI use was correctly classified as incidental, assisted or embedded;
- whether disclosure obligations were met;
- what assurance or verification was applied;
- whether the AI system was used within its documented purpose and controls; and,
- whether professional judgement was appropriately exercised.

This is a process review, not a re performance of the instruction unless warranted.

4. Evidence base

The review may draw on:

- AI systems register entry;
- verification or reliability records;
- engagement letter or other terms disclosures; and,
- file notes and QA documentation.

The firm should be able to explain how it reached reliance, not merely assert confidence.

5. Outcomes

Possible outcomes include:

- confirmation that AI use was appropriate and compliant;
- clarification or explanation provided to the client;
- remedial steps (e.g., additional review, correction, or re issue); or,
- escalation under the organisation's complaints handling procedure, and potentially HR policies.

6. Feedback loop

Where issues are identified, the organisation should:

- update the AI systems register or organisation's risk register; and,
- adjust guidance, controls, or training as necessary.

13. APPENDIX D: AI SUPPLIER AND SYSTEM ASSESSMENT QUESTIONS

Before adopting an AI system for a significant or embedded reliance application, obtain and assess information proportionate to the proposed use and level of reliance. Document the information received, any limitations, and the basis for the adoption decision.

Inadequate responses are themselves informative. A vendor unable or unwilling to explain training data, validation methodology, or known limitations presents a risk that must inform your decision. Silence is not neutral.

For enterprise AI systems

Training and validation:

- What data was the system trained on?
  Does it include adequate coverage of Irish property markets?
- How was accuracy validated, and in what contexts?
  Do validation conditions match our intended use?
- What are the known limitations and failure modes?
- Can you provide validation reports or third-party audit results?

Data handling:

- Where is data processed and stored?
- Is our data used to train or improve the model?
  Can this be contractually excluded?
- What security certifications apply?
  What are data retention and deletion policies?

Liability and support:

- What warranties do you provide regarding accuracy or performance?
- What liability do you accept for errors in outputs?
- What support is available, and with what response commitments?

Oversight:

- What logging and audit trails does the system provide?
  In agentic AI uses, can the system provide a record of information retrieved, tools invoked, actions performed, prompts used, and outputs generated that is sufficient to support professional review and quality assurance?
- How will we be notified of material changes to the system?

For consumer AI tools (ChatGPT, Claude, Gemini, etc.)

Most professionals will first encounter AI through consumer tools rather than enterprise systems. Different due diligence applies:

Understand the terms of service. Consumer AI tools typically reserve rights to use inputs to improve their models. Enterprise or professional tiers often provide stronger data protection – verify the specific terms for the tier you use.

Do not upload confidential client data to consumer AI tools without explicit client consent and clear understanding of how that data will be handled. This applies regardless of how useful the tool might be.

Recognise the absence of validation. Consumer generative AI tools do not come with accuracy warranties or validation data. The burden of verification falls entirely on you.

Check your firm's policy. Many firms have established positions on the use of AI tools for client work. If your firm has no policy, this is a conversation to initiate.

Recording your assessment

Document: questions asked, responses received, your assessment of adequacy, and how this informed your adoption decision. This record demonstrates appropriate due diligence and supports professional accountability.

14. APPENDIX E: RESOURCES

Irish regulatory context

- **Property Services Regulatory Authority (PSRA)** – psra.ie – licensing requirements and conduct standards for property service providers
- **Data Protection Commission** – dataprotection.ie – guidance on AI, automated decision-making, and GDPR compliance in Ireland
- **Law Reform Commission** – lawreform.ie – ongoing work on AI and legal frameworks (consult for developments)
- **Central Bank of Ireland** – where AI applications involve regulated financial activities, Central Bank guidance applies

EU framework

- **EU AI Act (Regulation 2024/1689):** available via EUR-Lex – full text and recitals
- **European Commission AI Act guidance** – digital-strategy.ec.europa.eu – FAQs, implementation timeline, risk classification guidance
- **GDPR text and guidance:** EUR-Lex and edpb.europa.eu (European Data Protection Board)
- **European Commission:** Voluntary Code of Practice on Transparency of AI-Generated Content – https://digital-strategy.ec.europa.eu/en/policies/code-practice-ai-generated-content

SCSI standards

- SCSI Code of Professional Conduct
- Relevant practice standards for valuation, property management, and building surveying
- SCSI CPD requirements and professional development resources

Global standards

- **RICS responsible use of AI in surveying practice:** For professionals working across Irish and UK jurisdictions, consult RICS guidance alongside this document. Approaches are broadly compatible; verify for specific circumstances – https://www.rics.org/profession-standards/rics-standards-and-guidance/conduct-competence/responsible-use-of-ai
- **OECD AI principles:** Intergovernmental guidance for policymakers to promote innovative, trustworthy AI that respects human rights and values – https://www.oecd.org/en/topics/sub-issues/ai-principles.html.

Professional indemnity

- Consult your broker regarding policy terms applicable to AI-assisted work. Market terms vary and are evolving. Notification requirements differ between insurers.

The SCSI will maintain current resource links through professional development channels.

15. APPENDIX F: ILLUSTRATIVE AI USE CASES BY PROPORTIONALITY TIER

These examples illustrate how common applications map to the framework. Classification follows from *how* AI is used, not merely *what* it is used for.

Incidental use

Grammar and style review: AI writing tools that suggest improvements to report clarity and consistency. The professional accepts or rejects each suggestion. Peripheral to substantive work.

Background research: Using conversational AI to understand unfamiliar concepts – lease structures, planning terminology, building systems – before reading authoritative sources. AI informs the professional's learning; professional reliance is on verified sources.

Meeting preparation: AI-generated summaries of lengthy documents to help the professional prepare for client meetings, where the professional has independent knowledge of the matter or will verify relevant points.

Document formatting: AI assistance with consistent styling, template application, or presentation layout. Substantive content remains professional generated.

Assisted practice

Comparable identification: AI searches transaction databases and suggests relevant comparables. The professional reviews each comparable against source records – transaction details, property characteristics, deal context – and makes selection decisions. AI expands the search; verification occurs at source level.

Draft report sections: AI generates initial draft text from professional inputs. The professional reviews against their own knowledge, verifies factual claims, and revises. Faster drafting; professional review ensures accuracy.

Lease summarisation with verification: AI produces structured summaries of lease terms. The professional reads the lease, uses the summary as a checklist or drafting aid, and verifies key provisions against the original. The summary assists; the lease governs.

Site note processing: AI transcribes and organises dictated observations into structured notes. The professional reviews against photographs and recollection, correcting and supplementing. AI handles transcription; professional judgement interprets.

Embedded reliance

High-volume document review: AI processes dozens or hundreds of documents where individual source verification is impractical. QA relies on sampling, exception flagging, and system validation. Where the use has a material impact on service delivery, the applicable RICS client communication requirements apply. Documented QA and appropriate system/process assurance are required for the embedded reliance classification.

Automated valuation model inputs without verification: AI generates value indications, adjustment factors or comparable selections within valuation workflows. Classification depends on how those outputs are used and how confidence in them is established. Where confidence depends substantially on system validation, testing or process assurance rather than direct verification of material outputs, the use will generally constitute embedded reliance. Material impact on service delivery should be assessed separately.

Portfolio-wide lease abstraction: AI extracts key terms across a substantial lease portfolio under time pressure. The professional spot-checks samples but relies on AI extraction for most documents. Governance requirements include vendor due diligence and a documented sampling and quality assurance methodology. Where the use has a material impact on service delivery, the applicable client communication requirements apply.

Systematic data extraction: AI extracts structured data from unstructured sources – planning documents, tender submissions, property particulars – at scale. Individual verification is impractical; confidence depends on validated system performance and appropriate sampling.

Material impact

Material impact is assessed separately from the proportionality tier. The same or similar use of AI may have a different material impact depending on how the output is used in the delivery of the professional service. The following examples illustrate this distinction.

Report drafting: AI helps a surveyor turn their inspection notes into draft report text. If the AI is principally helping to structure or express conclusions already reached by the surveyor, its impact on the service may be limited. If the AI interprets the observations and proposes findings or recommendations that materially inform the final professional advice, its impact may be material.

Comparable analysis: AI identifies potential comparable transactions, which the surveyor subsequently assesses and selects. If it simply

broadens the search that the surveyor conducts in their own analysis, its impact may be limited. If AI analysis or weighting of comparables materially influences the concluded valuation, its impact is more likely to be material.

Planning analysis: AI analyses a large dataset of planning applications and decisions to identify factors associated with approvals and refusals. If the analysis is used only to explore issues for further professional investigation, its impact may be limited. If those insights materially influence the surveyor's advice to the client on the likelihood of success, key risks or recommended planning strategy, the AI use may have a material impact on the service.

The question is not simply whether AI was used or which proportionality tier applies, but whether its contribution can materially influence the delivery of the professional outcome. Where the RICS Professional Standard applies, the material-impact determination should be recorded, and the resulting requirements followed.

16. APPENDIX G: WORKING UNDER BOTH SCSI AND RICS REQUIREMENTS

When this applies

The RICS Professional Standard applies to RICS members and RICS-regulated firms in accordance with its stated scope. SCSI members who are also RICS members must comply with requirements directed to individual RICS members. RICS-regulated firms must comply with applicable firm-level requirements. Other SCSI members should use this guidance as the relevant SCSI practice framework, together with any legal, contractual or service-specific requirements applying to their work.

The key difference

The SCSI classification and the RICS material-impact test are related but serve different purposes:

- **Incidental use** will ordinarily be unlikely to have a material impact.
- **Assisted practice** may or may not have a material impact, depending on the nature and significance of the AI contribution.
- **Embedded reliance** warrants particularly careful consideration of material impact because confidence depends substantially on system or process assurance. However, the classification does not automatically determine that the RICS material-impact threshold has been met.

Where the RICS Professional Standard applies, material impact should be assessed and recorded separately. Where the AI use has a material impact on service delivery, the applicable RICS requirements apply regardless of whether the use is classified as assisted practice or embedded reliance under this guidance.

Practical records that may support implementation

Where RICS Professional Standards apply, additional mandatory documentation obligations arise that sit alongside, and must be satisfied in addition to, this SCSI guidance at the firm level. For RICS regulated firms or RICS mandated instructions, the following must be in place where AI has a material impact on service delivery:

- a firm level register of AI systems used for materially impactful work, reviewed at least quarterly;
- a written assessment of appropriateness before using AI on a specific instruction;
- a written reliability determination for materially impactful outputs, prepared by or under the supervision of an appropriately qualified surveyor who accepts responsibility; and,
- engagement terms that explain AI involvement, including how clients may object, seek redress, or opt out where feasible.

Professionals already following this guidance's embedded reliance requirements – vendor due diligence, documented QA, explicit client disclosure – will have most of what the RICS requires. The additional step is formalising these into the specific documentary formats the RICS expects.

Practical approach

The use of the SCSI proportionality framework does not remove or reduce any obligation imposed by the RICS Professional Standards. Where both apply, compliance with both frameworks is required. Your existing engagement letters, file notes, and quality records can accommodate RICS requirements with modest adaptation.

For detailed RICS requirements, consult the RICS Professional Standard directly. This appendix provides orientation, not comprehensive compliance guidance.

Remember: The use of AI does not transfer or diminish the professional responsibility of the member or firm for the work delivered.

17. APPENDIX H: TEMPLATE FOR AI USAGE POLICY

ARTIFICIAL INTELLIGENCE USAGE POLICY

Firm name: [Firm name]

1. Purpose

This policy sets out how [Firm name] uses artificial intelligence (AI) responsibly, lawfully, and in accordance with professional obligations, including the RICS Professional Standards and SCSI guidance. Professional responsibility for all advice and deliverables remains with the firm regardless of AI use.

2. Scope

This policy applies to all partners, directors, employees, contractors, and consultants, and to all AI systems used in professional service delivery or internal operations.

3. Core principles

- AI supports professional judgement; it does not replace it.
- Accountability remains with the surveyor and the firm.
- Governance must be proportionate to risk.
- Clients must be informed about how services are delivered.
- Data protection and confidentiality are paramount.

4. Acceptable and prohibited use

AI may be used to assist with drafting, research, data analysis, and administrative tasks, provided that the outputs are reviewed by a suitably qualified professional. AI must not be used for fully automated decisions affecting individuals or to upload confidential data to consumer AI tools.

5. Data protection and confidentiality

All AI use must comply with GDPR and applicable data protection law. AI systems must be used only where a lawful basis exists, and appropriate safeguards are in place.

6. Human oversight and reliability of outputs

Where AI outputs have a material impact on professional services, a written reliability determination must be made by, or under the supervision of, an appropriately qualified surveyor who accepts responsibility for the output.

7. AI activities and classification

AI use is classified as incidental use, assisted practice, or embedded reliance. Classification determines the appropriate governance and assurance response. Client communication and documentation requirements should also reflect material impact and any applicable professional, legal, contractual, or regulatory requirements.

8. Register of AI systems

The firm maintains a written register of AI systems that materially affect professional services, recording purpose, classification, pre-use checks, verification approach, and review dates.

AI SYSTEM/TOOL	[E.G., MICROSOFT COPILOT]
Business area/service	[Valuation/PM/BS]
Purpose/use case	[e.g., drafting, analysis]
Use classification (incidental/assisted/ embedded)	[Select appropriate tier – incidental OR assisted OR embedded]
Data type used	[Personal/confidential/public]
Input verification	[Assessment of data readiness and information quality that will be used]
Pre-use checks completed	[Data protection impact assessment (DPIA), vendor due diligence, risk assessment]
Output verification/ QA method	[Source verification, sampling, QA checks]
Date first used	[Date]
System owner	[Role/name]
Last review date	[Date]
Next review date	[Year from last review]
Notes	[Notes as needed]

9. Risk register and governance

AI-related risks are recorded in the firm risk register and reviewed at least quarterly. Responsibility for AI governance rests with [Role/Title].

10. Client engagement and transparency

Where AI materially affects service delivery, engagement letters must explain the use of AI, verification processes, client opt-out options, and redress mechanisms.

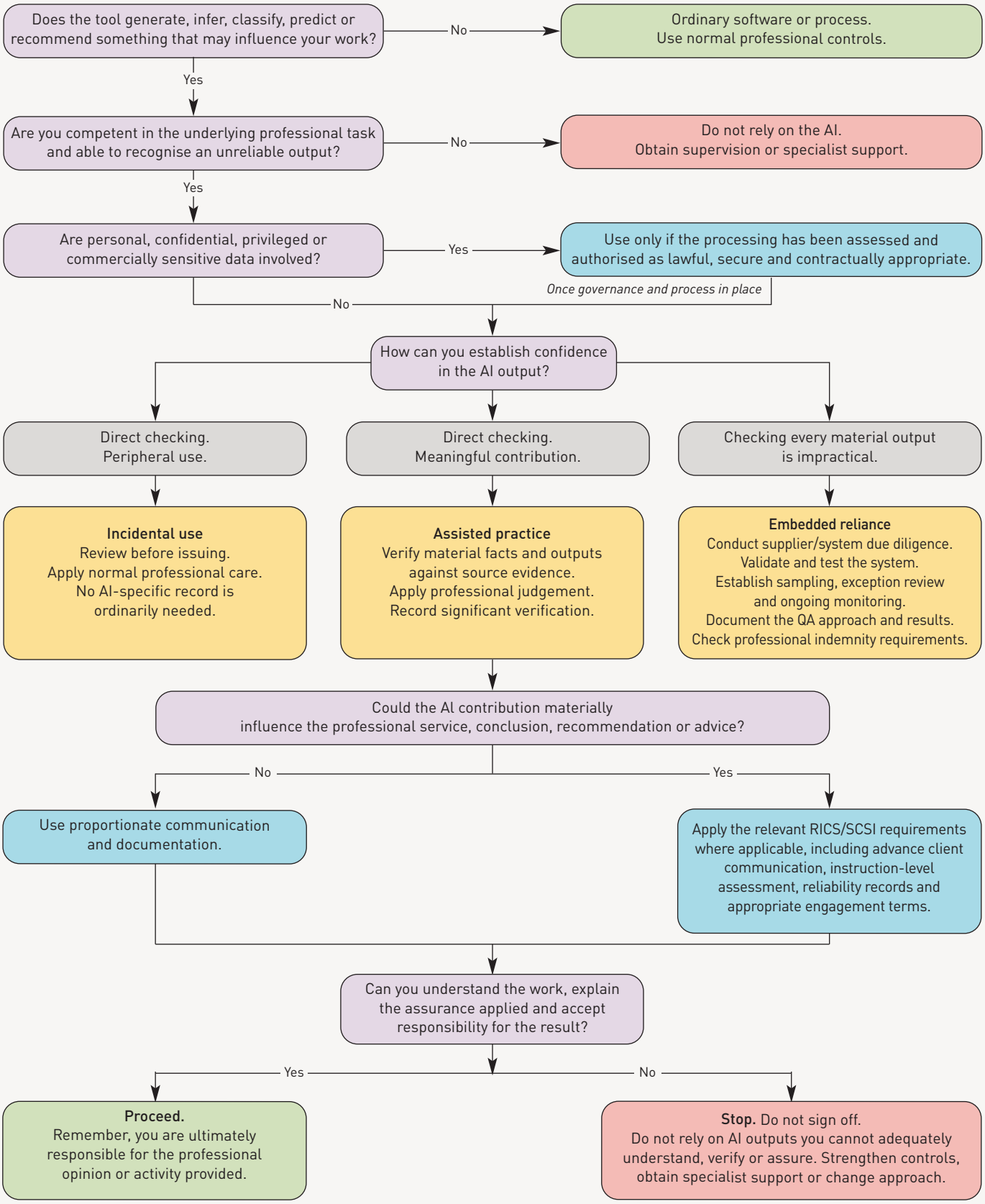
11. Training and competence

Staff using AI must maintain appropriate AI literacy relevant to their use. Training expectations are reviewed annually.

12. Review

This policy is reviewed annually, or sooner in response to regulatory or technological change.

18. APPENDIX I: AI WORKFLOW





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