

OPPORTUNITY
LONDON

Attracting capital to the Capital for good

The London Investment Prospectus

March 2025

Unlocking London: Unrivalled Investment Opportunities

Opportunity London is the capital investment partnership for London. It brings together every tier of London's government and is backed by industry to provide a network of investors with exclusive investment opportunities across low carbon real estate, energy and infrastructure.

The UK is ranked as the second most attractive country to invest in by global CEOs¹, with secure political, financial and legal institutions providing assurance to investors for their long-term core to opportunistic returns.

London is a trillion-dollar European Economy² and has consistently topped the World's Best Cities³ rankings for the past 10 years, and with a commitment to reach net zero carbon by 2030, London remains the most attractive city in the world to invest.

This Investment Prospectus brings together London's immediate investment opportunities, all of which have been carefully selected and will deliver benefits for our communities and the city's future, and strong returns for investors. Read on to discover our 20 top projects and places.

Advantage London

SCALE

**A trillion-dollar
European
Economy²**

TALENT

**The world's
best hub for
talent**

OPPORTUNITY

**Number one
city in the world
for investment
potential⁴**

1. PwC's 28th Annual Global CEO Survey

2. Urban region GDP estimates by Oxford Economics

3. Resonance World's Best Cities Report

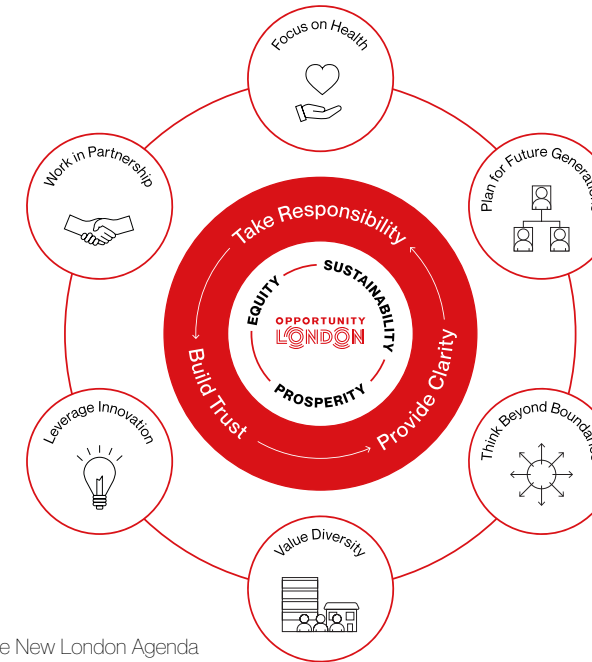
4. PwC Emerging trends in real estate



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London and UK: Invested in Growth

As London moves into a new 30-year development cycle, London's built environment community is working together with London's boroughs and the Mayor of London. We have already nearly completed a wave of large regeneration opportunities and the next cycle will provide even more opportunity. Alongside further major development sites, we are repurposing and reimagining our existing stock and driving forward a significant retrofit and net zero agenda.



The New London Agenda

Government Industrial Strategy

Setting out a credible plan to deliver the certainty and stability businesses need to invest in high growth sectors.

London Growth Plan

An action-focused plan developed jointly with London Councils and the Mayor of London that sets out a shared vision and set of priorities for London's economy, and shapes public and private sector investment by clearly signalling growth opportunities.

The London Plan

The statutory plan framework for how London will develop over the next 20–25 years and the Mayor's vision for Good Growth.

London Infrastructure Framework

A plan to identify and prioritise London's future infrastructure to 2050, given London's growth.

The New London Agenda

A framework for best practice in city-making, outlining the values that underpin London's built environment to deliver growth that is equitable, sustainable and prosperous.

WHY

London is liquid and secure, offering long-term returns

London is a global leader in finance, innovation, sustainability, diversity, and education. Our unrivalled financial centre status and world leading built environment sector, coupled with our booming innovation and technology ecosystem, attracts businesses and talent from across the world. Our commitment to sustainability and connectivity further enhances our demand allure and sets us apart globally. With the UK ranked the world's most transparent place to invest in real estate, London is consistently among the largest international real estate investment markets, with over £250bn traded in the past decade.

London's rich history and stable political, legal, financial and regulatory environments offer unique opportunities for investment whilst delivering returns for global investors.

opportunity.london/why ↗

A global financial capital

- **Europe's top financial centre**, second only to New York globally.
- **Robust financial and built environment industry** that attracts businesses, investors, and professionals from around the world.
- **Dominates globally in cross-border capital flows** with over \$8bn in the past year.
- **The world's largest hub for financial and business services talent**, with 2.6million employees.
- **The world's largest airport system**, with London's biggest airport (Heathrow) surpassing pre-pandemic passenger levels and National Government committed to further expansion.

An innovation and technology hub

- **A thriving ecosystem for startups and established tech giants**, supported by a high concentration of skilled tech professionals.
- **Europe's leading tech hub**, with over \$11bn of venture capital investment in 2023.
- **The highest number of \$1 bn+ tech businesses in Europe**, a testament to our supportive environment for technological innovation and entrepreneurship.
- **Europe's top city for life sciences**, ranking third globally after Boston and New York, according to MedCity's Life Sciences Global Cities Comparison Report.

A place of diversity and education

- **More than 300 languages spoken.**
- **Unmatched diversity** that enriches the fabric of the city, fostering a global outlook and cultural exchange.
- **Four UK universities in the top ten** of the QS World University Rankings 2024, two of them in London.
- **A highly educated workforce** and magnet for top students from around the world.

Pioneering sustainability

- **More parks than any other city in Europe**, making London one of the world's greenest capitals.
- **The world's largest Low Emission Zone**, encouraging eco-friendly practices and combating air pollution.
- **A pioneering underground system** that keeps growing, with the recently opened Elizabeth Line extending fast and clean transport to 1.5 million people.



HOW

London can be complex; Opportunity London is your partner to navigate it

ARUP

As the largest city in western Europe, London is a big and complex ecosystem of people, institutions and places built over 2,000 years of history. London is governed by 33 different local authorities plus a Greater London Mayor. They are committed to continue to build a city that works for residents, businesses, investors and visitors. All seek to meet the highest sustainability standards and respect rich historical and natural heritage. This is no easy task. The London development system can mystify new investors, but Opportunity London is your partner to advise and support.

Dedicated Support

Opportunity London have a team in place to support your investment journey into and across London.

- **Gateway to London's ecosystem:** Providing a trusted and credible contact for engagement with London's investible opportunities.
- **Cross-border capital introductions:** Connecting investors within London's pipeline of projects and landowners.
- **Investor-ready portfolio:** Showcase of investible projects across London, developed in conjunction with our partners and London boroughs.

opportunity.london/how ↗

London leads the world in real estate and infrastructure

Real Estate



Low Carbon Commercial

Including retrofit, sustainable workplace



Life Sciences & Learning

Innovation Hubs including the Knowledge Economy, Innovation Districts and university facilities



Leisure & Culture

Including wellbeing, retail, cultural venues and creative production spaces



Logistics & Light Industrial

Including innovative warehousing and distribution hubs



Living - All Market Tenures

Including build-to-rent, student, co & later living, and affordable housing

Infrastructure



Transport

Including station redevelopments and new connections



Energy

Including heat networks, energy efficiency and other renewables



Data Centres

Including carrier neutral and non-neutral facilities

WHERE

Billions in opportunities across London

Inward investment has transformed London over the last two decades. London is the global capital and a haven for real estate investment, with the highest level of transactional activity in Europe.

London's esteemed reputation, history of resilience, premium on liquidity and proven track record of delivering solid returns on investment continue to attract international investors, with many choosing London as their signature investment within their European portfolio.

Recent major investment in some of London's most iconic assets including Heathrow Airport, St Katharine Docks, the Knowledge Quarter around Kings Cross and New Bond Street are all proof of London's economic dynamism, with opportunities for growth and development across Greater London.

opportunity.london/where

London: Going for Growth

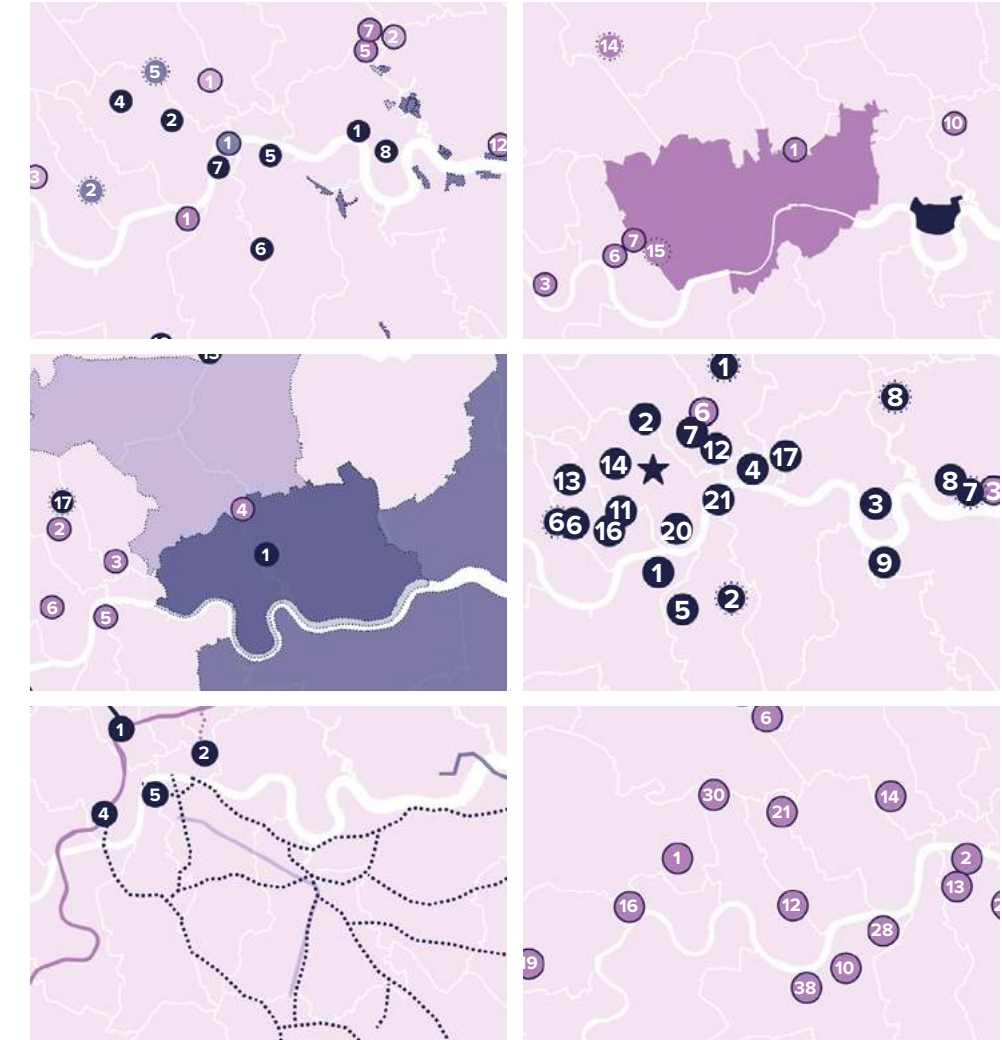
The London Growth Plan has been jointly developed by the Mayor of London, London Councils, businesses and universities to set out how partners will grow London's economy over the next decade.

The plan identifies six key growth sectors for London's economy: Life Sciences, Climate & Nature, Financial & Professional services, Creative industries, Experience economy and International Education.

London now has a clear mission for growth and is supported by a pipeline of investment opportunities within business and capital investment across London Boroughs and the City of London.

Visit the website below for more information on the Growth Plan and to view London's investment opportunities and policies for growth in each borough and sub-regional area with interactive sector maps and live data.

growthplan.london



Transport and Infrastructure – Unlocking Growth Opportunities

London continues to expand its pioneering public transport system, with recently inaugurated expansions of the underground to Battersea Power Station (one of Europe's largest regeneration schemes) and the overground to Barking Riverside. The Elizabeth Line, which has already become the UK's busiest railway, has brought 1.5 million Londoners closer to the main employment and cultural centres.

London is seeking opportunities to partner with private finance to enable the delivery of the next wave of priority transport schemes; the DLR Extension to Thamesmead, West London Orbital and the Bakerloo Line Extension. Crossrail 2 remains a longer-term aspiration.

DLR Extension to Thamesmead

Extending the DLR from Gallions Reach to Thamesmead via Beckton Riverside would connect two opportunity areas with enhanced public transport, creating 10,000 jobs and 25,000–30,000 new homes.

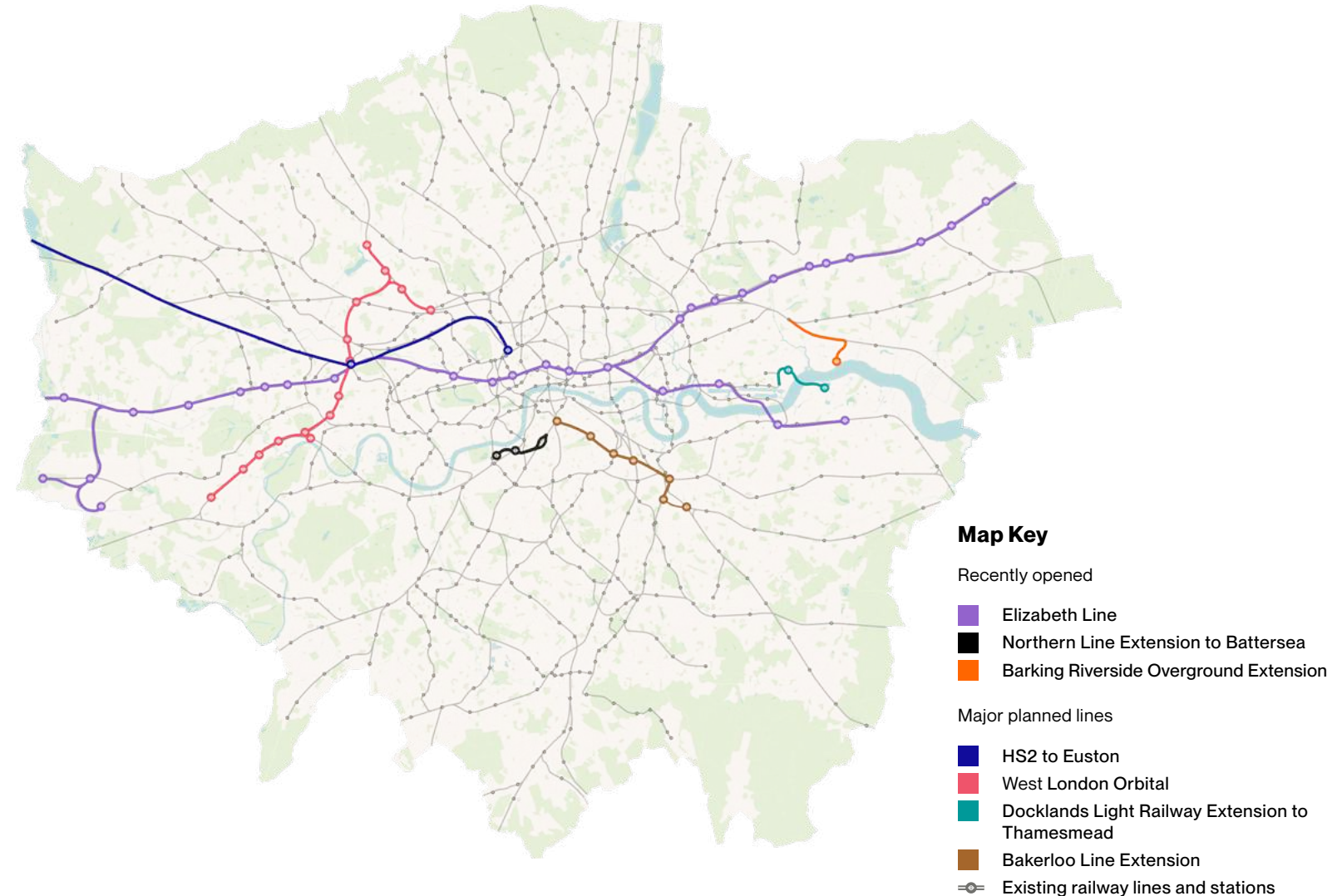
West London Orbital

Upgrading under-utilised freight lines, transforming them into passenger services, providing a strategically important orbital public transport option across west and northwest London. The scheme is a catalyst for growth, unlocking new homes and jobs, and allowing nearly half a million more people to reach Old Oak Common within an hour's journey, building on the growth plan for the area supported by High Speed.

Bakerloo Line Extension

Extending the Bakerloo Line from Elephant & Castle to Lewisham, with scope for a potential further extension to Hayes and Beckenham Junction. The extension would unlock 20,000 new homes in Old Kent Road, Lewisham, Catford and New Cross whilst significantly increasing access to jobs and services in central London, helping to generate £1.5bn a year in GVA.

Recent and future major transport links



Source: Greater London Authority

PROJECTS AND PLACES

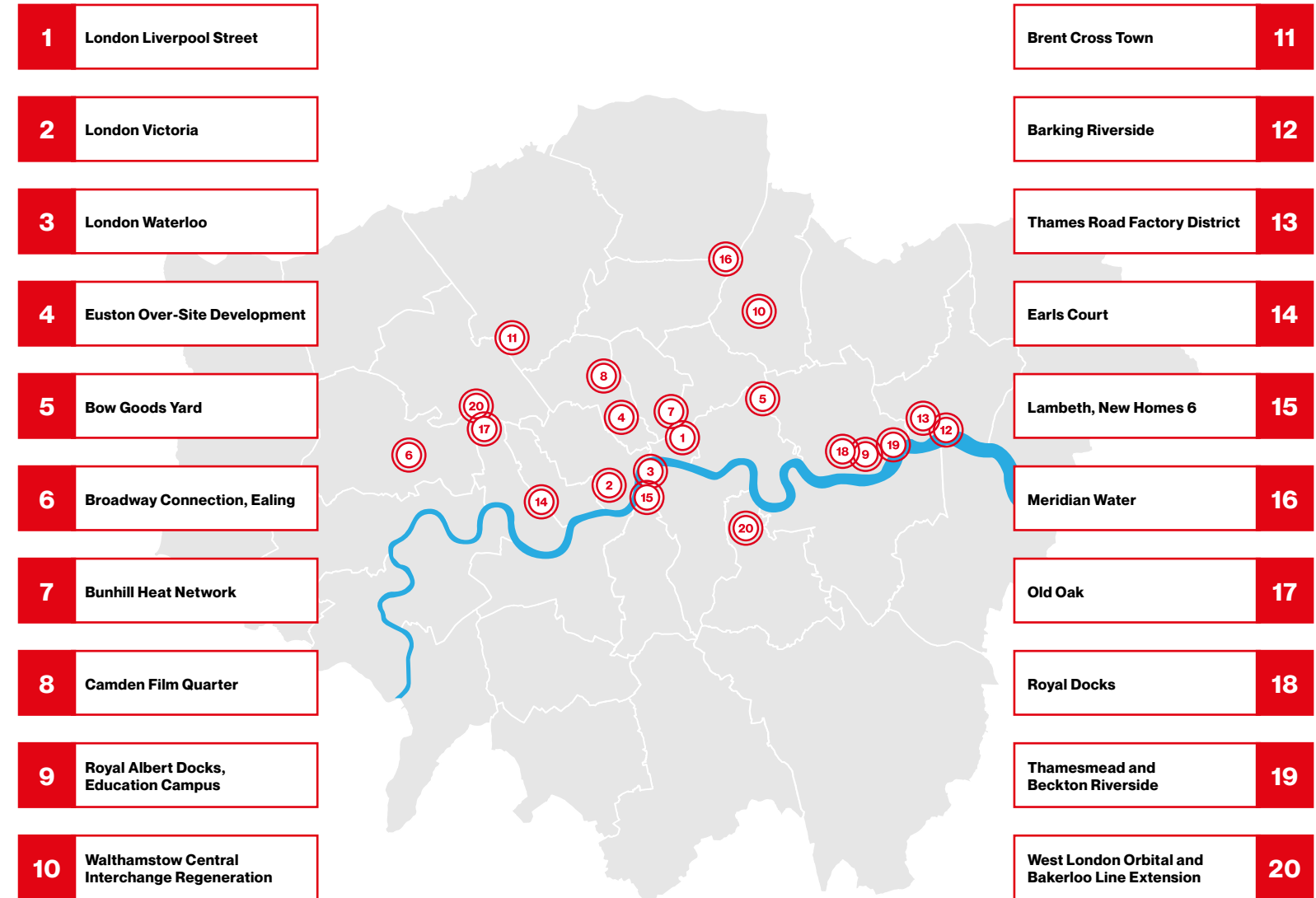
£22bn of investible opportunities totalling £77bn GDV

In 2024, Opportunity London supported £500m of investment into London, with more than 150 investor connections made to projects and partners.

This update to the Opportunity London Investment Prospectus presents 20 live opportunities seeking over £22bn of investment, across all asset classes. It features a core infrastructure development pipeline with four of London's major transport hubs, along with energy, build-to-rent, student accommodation, logistics, urban sciences and leisure schemes.

The featured schemes have been reviewed for market readiness, alignment to London's government policies and the values of Opportunity London. Each project has a team ready to engage with interested investors.

In addition to those featured in this prospectus, Opportunity London has a rolling pipeline of investible opportunities which are tailored to investors based on specific needs, as well as a network of more than 70 industry partners — including some of London's leading developers — and connections across every tier of government and all of London's 33 local authorities, the Mayor and Government.



Over £10bn London Transport Hub Opportunities

Network Rail Property (NRP) with Places for London manage an extensive portfolio of retail and leisure destinations across their London stations. Delivering double digit retail sales growth, £1bn of sales per annum, alongside developing sustainable neighbourhoods with over 4,300 homes delivered last year. As the largest owner of brownfield lands across Great Britain, NRP is now unlocking a substantial pipeline of strategic projects, with over 40 partnerships across the country. Here is a highlight of major projects, with over £10bn of investment opportunities, in London alone.



London Liverpool Street

Investment proposition:

Delivering a sustainable and well-connected landmark office building, combined with a transformed retail and leisure destination, will secure the future of one of the world's great stations. The redevelopment will increase the size of the mainline station concourse and ticket hall and improve step-free access.

Overview:

- Great Britain's busiest station, connecting over 100 million people a year
- 1m sq ft of commercial space
- 200,000 sq ft of retail and leisure
- Fully accessible station
- Increased concourse capacity

GDV: **£2bn**

Planning status: **Planning determination 2025**

Development timeline: **Delivery 2027**

Asset class: **Low Carbon Commercial, Leisure & Culture, Transport**



London Victoria

Investment proposition:

The opportunity for London Victoria, one of central London's main termini, is to create a new workplace, retail and leisure destination whilst simultaneously contributing to Westminster and London's economic success. In partnership with Places for London, a multi-modal approach to comprehensive regeneration could deliver a sustainable and accessible transport hub capable of supporting future customer and community demand.

Overview:

- Up to 2m sq ft of commercial
- 300,000 sq ft of retail, food and beverage
- The opportunity for homes in the wider borough
- Gateway station to and from London Gatwick

GDV: **c.£2.5bn**

Planning status: **Masterplanning 2026**

Asset Class: **Low Carbon Commercial, Leisure & Culture, Transport, Living**



London Waterloo

Investment proposition:

The London Waterloo Station vision sets out an aspiration for transforming the station and its surrounding area through providing a new workspace, retail, leisure and culture offer to deliver the widest employment opportunities for a revived South Bank neighbourhood.

Overview:

- Up to 1.5m sq ft of commercial
- 400,000 sq ft of retail, leisure & culture
- New retail and leisure destination for South Bank

GDV: **c.£3bn**

Planning status: **Masterplanning 2025, Planning 2026/27**

Asset Class: **Low Carbon Commercial, Leisure & Culture, Transport, Living**



Euston Over-Site Development

Investment proposition:

Euston is the largest regeneration project in central London, offering a diverse range of opportunities across life science & innovation, AI, technology, culture and residential development.

Overview:

- 6m+ sq ft science & innovation, workplace, retail and cultural space
- New civic and public spaces
- Commercial and residential opportunities to be delivered from 2030 onwards

GDV: **c.£6bn**

Planning status: **Planning application commences Q2 2025**

Development timeline: **Delivery from 2030 onwards**

Asset class: **Life Sciences & Learning, Low Carbon Commercial, Living, Leisure & Culture, Transport**



Bow Goods Yard

Immediate Investment

Network Rail Property (NRP)

Investment proposition:

Bow Goods Yard is the last parcel of land to be unlocked as part of London's 2012 Olympic and Paralympic legacy. Protected for industrial use and neighbouring landmark stadiums, it defines the ambition for NRP's growing logistics portfolio.

Overview:

The land has consent for 3m sq ft of development, including logistics, warehousing/industrial, a leisure district and public realm. The Network Rail-led development will achieve renewable energy production, equivalent to powering over 1,100 homes, and the whole development will be designed to be climate resilient.

Key facts:

- 30 acres brownfield industrial site landlocked for 50 years
- 190,000m² logistics and employment use supported by up to 3,000m² food and beverage offering
- 8,200m² public realm
- Up to 5,000 new jobs

GDV:

Up to £3.5bn

Planning Status:

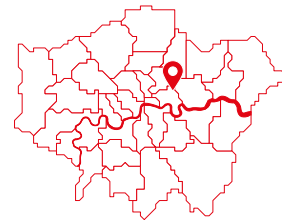
Outline planning application approved October 2024

Development timeline:

Detailed design and delivery strategy 2025/2026

Asset class:

Logistics & Light Industrial



Broadway Connection

Immediate Investment

British Land

Investment proposition:

British Land are seeking major commercial and/or education occupiers requiring over 100,000 sq ft of pre-let space, with flexible designs that can be adapted to reflect specific occupier needs. British Land are flexible on deal structure, including joint venture equity partnership or other structures tailored to investor interest.

Overview:

Ealing offers the economic opportunity and connectivity of an inner London borough, while providing the space and lifestyle offer of outer London. The site is on the doorstep of the new Elizabeth Line and situated near Ealing Metropolitan Centre which boasts a wide range of commercial, retail, cultural and civic amenities, as well as a large portion of the borough's knowledge intensive and film/tv sector jobs.

Key facts:

- 300,000 sq ft mixed-use redevelopment located directly opposite Ealing Broadway station, 12 mins to Bond Street and 19 to Heathrow
- Full redevelopment of 1.4-acre site with some existing buildings retained & refurbished

GDV:

£300m

Planning Status:

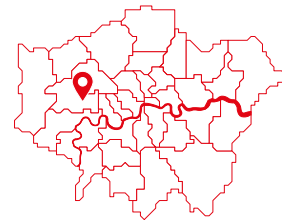
5-year planning consent with flexible leases in place to obtain vacant possession. c.4 year construction programme

Development timeline:

British Land owns the land and current occupiers are on a short-term lease. Planning permission granted

Asset class:

Low Carbon Commercial, Life Sciences & Learning, Leisure & Culture



© Stanton Williams

Bunhill Heat Network

Immediate Investment

London Borough of Islington

Investment proposition:

The London Borough of Islington are exploring a range of partnership arrangements to fund the expansion of their existing Heat Network; Bunhill. An enabling policy framework and business case are already in place.

Overview:

Islington plans to expand the Bunhill Heat Network near Old Street from two Energy Centres (EC1&2), the second recovering waste heat from the underground.

A new development nearby will require the relocation or decommissioning of EC1, strengthening the business case for a new energy centre.

As well as Bunhill, Islington Council is working with Government to develop commercial and investment business cases for zonal scale heat network developments (£50m+) and will be launching a pre-market engagement process in early 2025.

Key facts:

- £16.85m invested to date in Bunhill heat network providing heating to 14 buildings, 1,350 homes, schools & leisure centres
- Current peak demand 6.8 MW or 20,100 MWh/y
- Connection to City Forum commercial and residential development with 1,000 homes enables heat supply agreements
- Additional peak demand 5.28 MW or 6,960 MWh/y

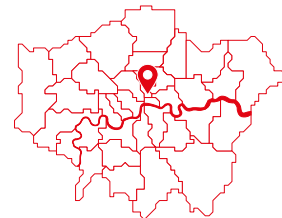
- Network expansion necessitates the construction of a new Energy Centre (EC3), pipework and thermal stores

GDV:
£31.3m to £48.2m

Planning status:
Finsbury Leisure Centre planning application submitted, and decision expected early 2025. Funding for City Forum expansion agreed

Development timeline:
Construction of EC3 and heat network target from October 2026. Heat Network expansion completion target date October 2029

Asset class:
Energy



Camden Film Quarter

Immediate Investment

Yoo Capital

Investment proposition:

The project is open for investment.

Overview:

Transformation of a 70-year-old industrial estate in Central £1bn+ London into the world's first dedicated film and television quarter in the middle of a major international gateway city. This will include sound stages, studios, virtual production and post-production, as well as hotels, galleries, public squares and residences as well as two schools in film and television spread across 20 freehold acres.

GDV:

£1bn+

Planning status:

Pre-application stage

Development timeline:

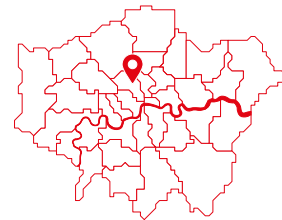
Delivery from 2028

Asset class:

Leisure & Culture, Living, Low Carbon Commercial

Key facts:

- 15 minutes north of 'Super Prime' London
- Excellent transport connectivity with underground and overground connections at Kentish Town and Gospel Oak
- A 20-acre regeneration
- 11 Sound Stages, linked to the National Film and Television School
- 50% affordable housing
- Hotels, offices, restaurant and eateries, independent retailers and markets, galleries and cultural spaces and public realm offerings



Royal Albert Docks, Education Campus

Immediate Investment

DPK

Investment proposition:

DPK is seeking equity investment / a joint-venture partner to support creation of a unique university campus in East London, comprising c.1,100 student beds and c.120,000 sq ft of teaching space.

Overview:

Royal Albert Docks London represents a unique opportunity to create a new London university campus or 'multi-versity' with attached student accommodation. It is also a key part of one of the Capital's most important regeneration areas, the broader Royal Docks, as well as being London's only Enterprise Zone.

Key facts:

- Conversion of c.500,000 sq ft of offices into a unique educational campus
- Unmatched transport links by road, air, rail and river
- Close to a high number of Higher Education Institutions (60 within 45 minutes travel time)
- Key part of the broader Royal Docks regeneration project

GDV:

c.£300m

Planning status:

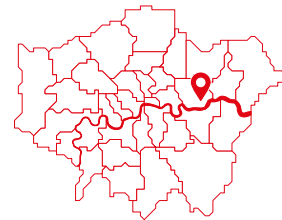
**Planning consent granted for the entire scheme:
Conversion of c.380k sq ft into 1,085 PBSA beds and
change of use of c.120k into teaching space**

Development timeline:

Targeting September 2026 opening

Asset class:

Life Sciences & Learning, Leisure & Culture, Living



Walthamstow Central Interchange Regeneration

Initial Conversation

London Borough of Waltham Forest

Investment proposition:

The Council is seeking private sector investment and development partners to deliver new infrastructure that will support stronger transport connectivity and unlock new commercial (c.43,000 sq ft), residential led mixed-use (c.1,500 new homes) and public spaces.

Overview:

Investment is required to address capacity and accessibility challenges at Walthamstow's transport interchange and unlock mixed-use regeneration with thousands of additional homes.

The Council, TfL and New River REIT (formerly Capital & Regional), long lease holder-operator of 17&Central shopping centre, have secured planning permission for a new step-free Victoria Line entrance and are delivering a first phase of works by Spring 2025.

Key facts:

- c.1,500 mixed-tenure homes and 5,000 sqm+ commercial uses on Council freehold land in the vicinity of the transport interchange, which has the highest Public Transport Accessibility Level (PTAL) 6
- 3,000+ homes on public and privately-owned sites across Walthamstow
- Includes opportunities for private sale, shared ownership, build to rent, social/affordable rent, co-living housing and student accommodation and retail, leisure, cultural, workspace and education uses
- Phased delivery commencing within a 1-5-year timeframe, completing by the mid-2030s

GDV:

£750m+

Asset class:

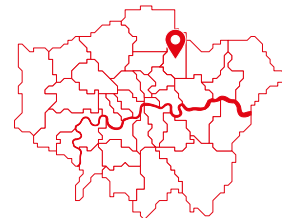
Leisure & Culture, Low Carbon Commercial, Living

Planning status:

Existing planning permission for new station entrance and first phases of 17&Central shopping centre

Development timeline:

Phased construction from 2026 to early/mid 2030s, including parallel works to deliver full station entrance



© New River/Capital & Regional

Brent Cross Town

Immediate Investment

Related Argent, in partnership with Barnet Council

Investment proposition:

Multiple investment opportunities are expected through the 15+ year delivery lifecycle of regenerating Brent Cross Town.

Overview:

One of Europe's largest net-zero regeneration projects, Brent Cross Town is guided by four pledges: to be London's home for participation in sport and play; to be a place where all can flourish; to be a net zero carbon town by 2030; and to drive new physical and social connections.

Brent Cross Town is gaining significant momentum following the recent opening of the mainline train station, Brent Cross West, which connects Brent Cross Town with St Pancras International in as little as 12 minutes.

Key facts:

- 180-acre park town development
- Mixed-use town set alongside 50 acres of parks and playing fields
- 7 buildings under construction, comprising over 930 homes with first residents in Autumn 2024
- Sheffield Hallam University to open satellite campus

GDV:

£8bn

Planning status:

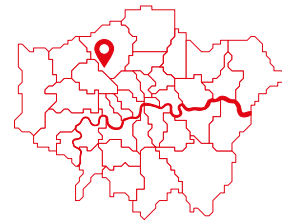
Masterplan planning consent. Detailed planning consents are required for individual 'plots' within the Brent Cross Town development as these prepare to come forward

Development timeline:

Phased project under construction with ongoing investment opportunities

Asset class:

Low Carbon Commercial, Transport, Leisure & Culture, Living



Barking Riverside

Barking Riverside

Investment proposition:

Bespoke investment opportunities including upfront infrastructure as well as residential and commercial sites via the appointed Barking Riverside plot developers.

Overview:

One of Europe's largest and most exciting residential developments, providing thousands of new homes on 443 acres — an area larger than Hyde Park — on the banks of the River Thames. A brownfield site, Barking Riverside is connected to central London via the Suffragette Line and river bus services. Already home to a diverse and active community, as well as five schools — including a high-performing secondary school — two community hubs; cycling and walking routes; open spaces and play parks; state-of-the-art recycling and waste management facilities; and a rolling calendar of social activities, including resident-led events and festivals, this location is ideal for home buyers who want fast and easy access to London as well as an abundance of green and blue spaces.

Key facts:

- Joint venture between the Mayor of London and L&Q housing association
- 3,500 homes already built or under construction, including Shared Ownership, London Living Rent and Affordable Rent

- £124m infrastructure funding package secured in November 2024 from Homes England for flood defence work, roads and parks, complementing the £56m previous grant funding also from Homes England secured in 2020.

GDV:

£6.6bn

Planning status:

Outline planning permission for 10,800 homes.
Uplift planning application to 20,000 homes to be determined in 2026

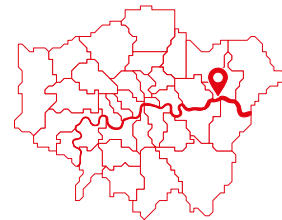
Development timeline:

Plots available now, with future construction phases expected every 12 – 18 months

Asset class:

Living, Low Carbon Commercial

Initial Conversation



Thames Road Factory District

Initial Conversation

Be First – London Borough of Barking & Dagenham

Investment proposition:

Joint venture partnerships across standalone sites or across a package of sites, to deliver the second phase of Thames Road Factory District, a new destination for East London at the gateway to Barking Riverside.

Overview:

Regeneration will transform underutilised brownfield land into a distinctive, commercially thriving residential and business neighbourhood called the 'Factory District', providing a lynchpin to complementary plans at Barking Riverside and in Barking Town Centre. Be First is working with Central Government on a public funding package as part of the forthcoming Spending Review. This will unlock phase 2 via land assembly, infrastructure provision and planning, to ensure 'investor ready' sites capable of delivering in excess of 1,000 homes within this parliamentary period.

GDV:

£1.83bn

Planning status:

Mix of pre-planning, planning permissions and resolution to grants awaiting s106 Agreements

Timeline:

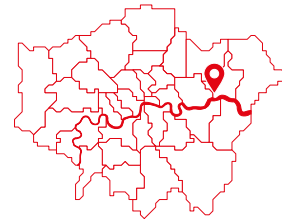
Phase 2 delivered by 2029

Asset class:

Logistics & Light Industrial, Living

Key facts:

- Significant Council land ownership (40%)
- Once complete, Thames Road will comprise up to 3,500 homes alongside 44,000 sqm of industrial floorspace
- Completed phase 1 comprises Industria, a multi-storey industrial scheme, and 12 Thames Road, co-located residential and industrial



Earls Court

**Earls Court Partnership Limited (JV between Delancey, APG and Places for London).
Managed by Earls Court Development Company.**

Investment proposition:

ECPL is seeking a long-term aligned Institutional Capital partner to deliver Earls Court Phase One including infrastructure, sustainability and real estate funding. There will be future investment opportunities in a development program that will span 20 years in delivery.

Overview:

Earls Court is a once in a generation opportunity to transform 44 acres of an iconic part of Central London into a new piece of city.

A showcase for clean and climate innovation and underpinned by ambitious sustainability targets, the development will bring: up to 4,000 homes, 2.9m sq ft of workspace, three anchor cultural venues and 12,000 jobs set within a landscape-led development where there will be 20 acres of public open space.

Key facts:

- 44-acre cleared development site in Central London with 3 tube stations adjacent
- Up to 2.9m sq ft of office, commercial, culture and retail
- c.4,000 new homes including for sale, to rent, later living, student accommodation and affordable housing
- 2m sq ft 1st phase of development (start on site from 2026)
- 20 acres of open space

GDV:

£10bn

Development timeline:

Marketing will commence Q1 2025. Target funding close in line with planning

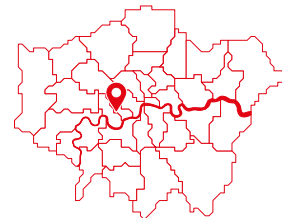
Planning status:

Planning application for 7.5m sq ft new masterplan submitted in Summer 2024 including detailed designs for phase one. Start on site of construction targeted late 2026

Asset class:

Living, Low Carbon Commercial, Life Sciences and Learning, Leisure & Culture

Initial Conversation



Lambeth, New Homes 6

Immediate Investment

London Borough of Lambeth

Investment proposition:

The Council is seeking to secure the appointment of a development partner to establish a contractual partnership to deliver various sites across the borough.

Overview:

The Mayor and Burgesses of the London Borough of Lambeth are seeking to secure a development partner to bring forward six development sites across the borough.

The initial portfolio could deliver approximately 450 new homes, including much needed affordable housing provision, and will contribute to the wider Lambeth area through community and social investment, enhanced new landscaping and green spaces.

Key facts:

- A combined developable area of circa 2.09 hectares across Lambeth
- Residential-led portfolio, maximising housing delivery (over 450 units across initial sites)
- Maximising delivery of affordable homes in line with the Authority's objectives (achieving at least 35% for each of the sites)

GDV:

£400m

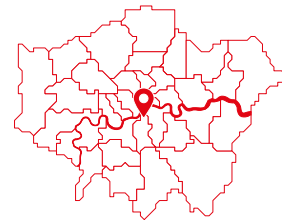
Planning status:

Planning permission obtained for 5 out of 6 sites. Pre-application advice received for the last site

Development timeline:

- **Preferred partner identified – November 2025**
- **The partnership is expected to last for an initial term of 10 years, with the option to extend up to a further 10 years**

Asset class: **Living**



Meridian Water

Enfield Council

Investment proposition:

London Borough of Enfield is seeking development partners for a variety of upcoming residential, logistics/industrial and mixed-use opportunities to deliver high quality transformational regeneration. Partnership arrangements can be structured to meet the needs of the developer/investor and the specific opportunities presented by individual sites.

Overview:

Meridian Water is one of London's largest regeneration projects spanning 85 hectares. Enfield Council is the master developer, bringing 10,000 homes and 6,000 high quality jobs to North London. 22 Meridian development parcels are expected to come forward over the next two decades. Meridian One is currently under construction and is expected to deliver around 1,000 homes and commercial space next to the new Meridian Water train station.

Key facts:

- 10,000 homes and 725,000 sq ft commercial floorspace, including potential for industrial and logistics
- Meridian Water train station opened in 2019
- £195m Government funding for strategic infrastructure works
- Vibrant meanwhile offer, including a third-party 15,000 capacity events venue

GDV:

£6bn

Planning status:

Much of the site has planning permission (phases 1 and 2). For the remainder, there is a clear pathway for planning for future phases

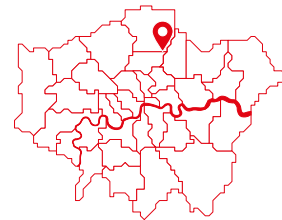
Development timeline:

Construction has started and will continue for 25 years

Asset class:

Living, Low Carbon Commercial

Immediate Investment



Old Oak and Park Royal Opportunity Area

Old Oak and Park Royal is one of the UK largest brownfield development opportunities, creating a whole new district of London with a mix of homes, employment space, high streets, community facilities and high-quality public realm, built around the new High Speed 2 station at Old Oak Common. Old Oak Common station will be the only interchange between HS2, the Elizabeth line and the Great Western mainline, and will connect to Heathrow in ten minutes.

Old Oak major regeneration project

Initial Conversation

Old Oak and Park Royal Development Corporation (OPDC)

Investment proposition:

OPDC, the Mayor of London's statutory regeneration and planning authority, is seeking a long-term development and investment partnership to support the regeneration of Old Oak, unlocking 9,000 homes and 11,000 jobs across approximately 70 acres of publicly owned land. The project has secured over £300m of public funding to date.

Overview:

- 9,000 homes, targeting 50% affordable homes on public land
- Up to 3m sq ft of employment space
- Low-cost low carbon energy from innovative district heat network
- 25 acres of public realm
- 6 acres of parks and green space
- 1km of canal enhancements

GDV:
£9.8bn+

Planning status:
Planning policy adopted. Illustrative masterplan in development.

Development timeline:
Beginning developer and investor procurement in the next 9 months. Aligned with Old Oak Common station, opening between 2029 - 2033, with potential for first phase to come forward in advance.

Asset class:
Living, Energy, Transport, Life Sciences & Learning, Low Carbon Commercial

One Portal Way, North Acton

Immediate Investment

Imperial College London

Investment proposition:

Imperial are currently seeking investment for multiple long-term investment opportunities which are expected to come forward across the mixed-use masterplan. Deal structure for Phase 1 development is flexible.

Overview:

- Full redevelopment of 4.57-acre site
- New landscaped town centre, improved public realm and major public space
- 1,325 new homes across various tenures, with 35% affordable housing, including student accommodation
- 200,000 – 300,000 sq ft of employment space
- Served by the Central and Elizabeth Lines and future transport super-hub Old Oak Common Station

GDV:
£1.2bn+

Planning status:
Granted planning permission in 2024, including detailed consent for Phase 1 comprising Building A at 55 storeys, providing 461 BTR units and Building F, at 18 storeys has flexible consent for 384 Co-living or PBSA studio units.

Development timeline:
Phase 1 developer and investor procurement in 2025 - 2026. Practical completion of Phase 1 expected to be Q2 2027 – Q2 2031.

Asset class:
Living, Leisure & Culture, Life Sciences & Learning Low Carbon Commercial

There will be further opportunities upcoming with Imperial College London within the WestTech Corridor.



Royal Docks

The Royal Docks is one of the UK's largest regeneration opportunities, with 175ha in GLA ownership. The area is re-emerging as a distinctive destination, with approximately £5 billion worth of investment planned over the next twenty years, supporting the delivery of 36,000 new homes and 55,000 new jobs.

Royal Albert Dock

Initial Conversation

Greater London Authority (GLA)

Investment proposition:

The GLA are seeking an innovative development partner to deliver a major transformational new mixed-use place.

Overview:

- Contributes to supporting 36,000 new homes and 55,000 new jobs across the wider Opportunity Area
- 30-acre site
- 4m sq ft of development potential
- Served by two DLR stations. Elizabeth Line 4 mins away by DLR

GDV:

£3bn

Planning status:

Partially implemented hybrid consent; new planning application expected from development partner. Site is within Royal Docks and Beckton Riverside Opportunity Area.

Development timeline:

Ready to take to market, anticipated launch of procurement documents Spring 2025.

Asset class:

Low Carbon Commercial, Living, Leisure & Culture

Millennium Mills

Immediate Investment

The Silvertown Partnership (Lendlease and Starwood Capital)

Investment proposition:

The development JV (The Silvertown Partnership) is seeking a capital investment partner committed to long term capital growth and delivery significant environmental and social impact with the refurbishment of this heritage asset.

Overview:

- 60 acre dockside site located in London only Enterprise Zone
- Upon completion Silvertown will deliver 6,500 homes and up to 10,000 jobs
- Includes the delivery of significant infrastructure including a new at grade pedestrian and cycle bridge connecting Silvertown to the Elizabeth Line, transforming its connectivity (from site to West End in 15 minutes)
- High quality design by AHMM which celebrates the history of this unique asset

GDV:

£160m

Planning status:

Detailed permission granted in 2019 and amended in 2023 to reflect current market expectations from occupiers.

Development timeline:

Earliest completion expected 2029

Asset class:

Life Science & Learning, Low Carbon Commercial, Leisure & Culture



Thamesmead and Beckton Riverside

Extending the Docklands Light Railway could unlock 25-30,000 homes and 10,000 jobs in an area totalling 145 hectares. Consultation conducted last year has demonstrated high levels of public support.

DLR Extension

Initial Conversation

Transport for London

Investment proposition:

TfL are seeking to explore financing opportunities to leverage off-balance sheet capital investment through Public Private Partnership.

Overview:

- Led by the Mayor of London and supported by Greenwich and Newham boroughs
- Expected to unlock 25,000 – 30,000 homes
- A catalyst for regeneration and growth
- The scheme would cost around £1bn (2023 prices), with a c£1.5bn outturn (nominal)

Planning status:

Submission of business case in summer 2025

Development timeline:

Construction would begin in late 2020s with the DLR extension operating and new homes built by the early 2030s. Planning application due winter 2026

Asset class:

Transport

The Thamesmead Waterfront

Initial Conversation

Peabody and Lendlease joint venture

Investment proposition:

A joint venture by Peabody and Lendlease, Thamesmead Waterfront has the potential to deliver up to 15,000 homes, thousands of jobs, a rejuvenated and expanded town centre and exceptional open spaces.

Overview:

- 100 hectares waterfront development opportunity with potential for 15,000 homes
- Business case being developed for DLR extension
- Part of a town-wide regeneration led by Peabody and partners

GDV:

c.£8bn+

Planning status:

Strategic masterplan completed

Development timeline:

From 2028 (subject to the DLR extension)

Asset class:

Low Carbon Commercial, Leisure & Culture, Logistics & Light Industrial, Living, Infrastructure, Transport, Energy

Beckton Riverside Phase 2

Initial Conversation

St William Homes LLP (part of the Berkeley Group)

Investment proposition:

The DLR extension would unlock the second phase of the 34-hectare Beckton Gasworks regeneration site, creating the vital transport capacity to deliver a new town centre, 3,000 additional homes on St William land, community facilities, new schools and health and sports facilities.

Overview:

- 34 hectares owned by St William (part of the Berkeley Group)
- Approximately 6,000 homes in total (including phases one and two)
- Phase 1 subject of an existing planning application
- Phase 2 to be part of a future application subject to new transformative public transport infrastructure
- Opportunity for thousands of additional homes, above the 6,000, on third party land

GDV:

£2.8bn

Planning status:

Beckton Riverside Phase 1 in planning with planning committee expected in Q3 2025.

Development timeline:

Beckton Riverside Phase 1 to commence on site in 2027 with first homes to be delivered in 2030. Beckton Riverside Phase 2 to deliver homes in the early 2030s following the delivery of the new DLR station and line extension.

Asset class:

Living, Leisure & Culture, Transport



Power of Place Partnerships

London Heritage Quarter is at the forefront of transformative projects in the historic centre of the UK's capital. Past projects include Strand Aldwych, which was unveiled as a new public space in December 2022. The £22 million transformation was led by London Heritage Quarter, Westminster City Council and other stakeholders, to turn one of London's busiest and most polluted streets into a pedestrian-friendly cultural hub. Covering over 7,000m², the project strengthens connections between key institutions such as King's College London, The Courtauld Institute, and Somerset House.

Building on this momentum, Project SWAN, is a major upcoming project set to revolutionise local infrastructure whilst supporting businesses with decarbonisation. London Heritage Quarter, in partnership with the Department for Energy Security and Net Zero, is championing this low-carbon heat network to provide cleaner, more efficient energy by utilising sustainable sources like the River Thames and TfL ventilation shafts. The project will significantly cut carbon emission, reducing 75,000 tonnes annually and improve air quality across the area. With the potential to power 500 buildings from Pimlico to Strand Aldwych, Project SWAN represents a critical step towards a greener, more resilient London. The initiative will not only reduce emissions by 92% by 2040 but also ensure long-term energy security for the area.

Another major project, Future Victoria, will reshape the Victoria Station area over the next 20 years. In collaboration with Network Rail, Westminster City Council, the GLA and Transport for London, the project aims to deliver a redeveloped station and new surroundings. These projects highlight the opportunities for growth and investment in London Heritage Quarter, ensuring that businesses, communities, and cultural institutions continue to thrive while attracting new developments and creating an area that benefits residents, businesses, and visitors.

london-hq.co.uk ↗



LONDON HERITAGE QUARTER

Accelerating Housing and Infrastructure Delivery

An innovative new public-private partnership has been established between Berkeley Group, the GLA, London Borough of Newham and Homes England to accelerate housing and infrastructure delivery and unlock more affordable homes across London.

TwelveTrees Park, a new sustainable mixed-use neighbourhood next to West Ham Station, will receive funding from this pioneering partnership, offering 4,700 new homes and almost 20,000m² of commercial, education and community space. As well as this key transport infrastructure will be built in the form of four new bridges and a new entrance for West Ham Station.

The partnership demonstrates the value of establishing sustained partnerships between the public and private sectors to accelerate progress and secure a long-term pipeline of transformative housing and infrastructure developments. The success of the partnership to-date enables us to understand the support needed to bring projects to delivery by pooling expertise and resources from across different bodies. In addition, this partnership emphasizes the role government can play in collaborating with both public and private sectors to help build a stronger, more prosperous London.

berkeleygroup.co.uk ↗



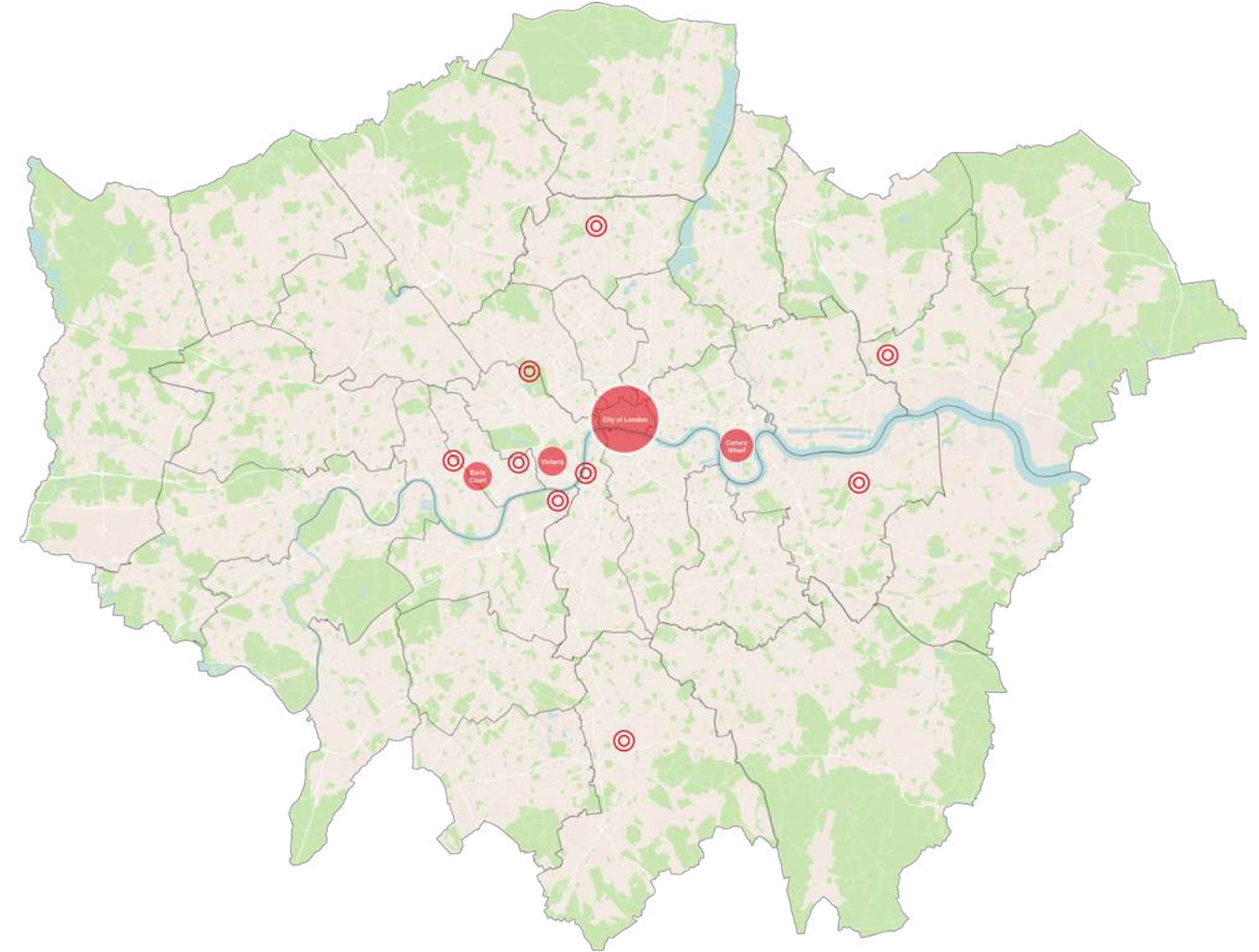
Pipeline for Future Investment & Off Market Opportunities

Opportunity London has dozens of additional exclusive, bespoke investment opportunities that offer core to opportunistic returns across public and private owned land, spanning various asset classes.

Our ongoing pipeline includes:

- **Major regeneration schemes in Barnet, Barking and Dagenham, Hillingdon, Lewisham and Newham**
- **Multimillion pound development projects by the City of London Corporation**
- **Pioneering energy projects and heat networks across London with E.ON and in Haringey and Hammersmith & Fulham**
- **Transformational schemes in Haringey, Camden, Croydon, Kensington & Chelsea, Lambeth, Greenwich and Wandsworth**

Wider opportunities across London



A Unique Partnership for London

Principal Partners:



A joint venture by



Team London Partners:



Team London Supporters:



Lead Advisors:



Affiliated With:



Programme Advisors:



Let's Talk

**For more on Opportunity London and investments in this prospectus,
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