



Attracting capital to the Capital, for good.

The London Investment Prospectus

September 2024

Your front door for investing into and across London

Opportunity London brings together every tier of London's Government, backed by industry, to provide a one-stop-shop that eases the path for capital investment across our great city.

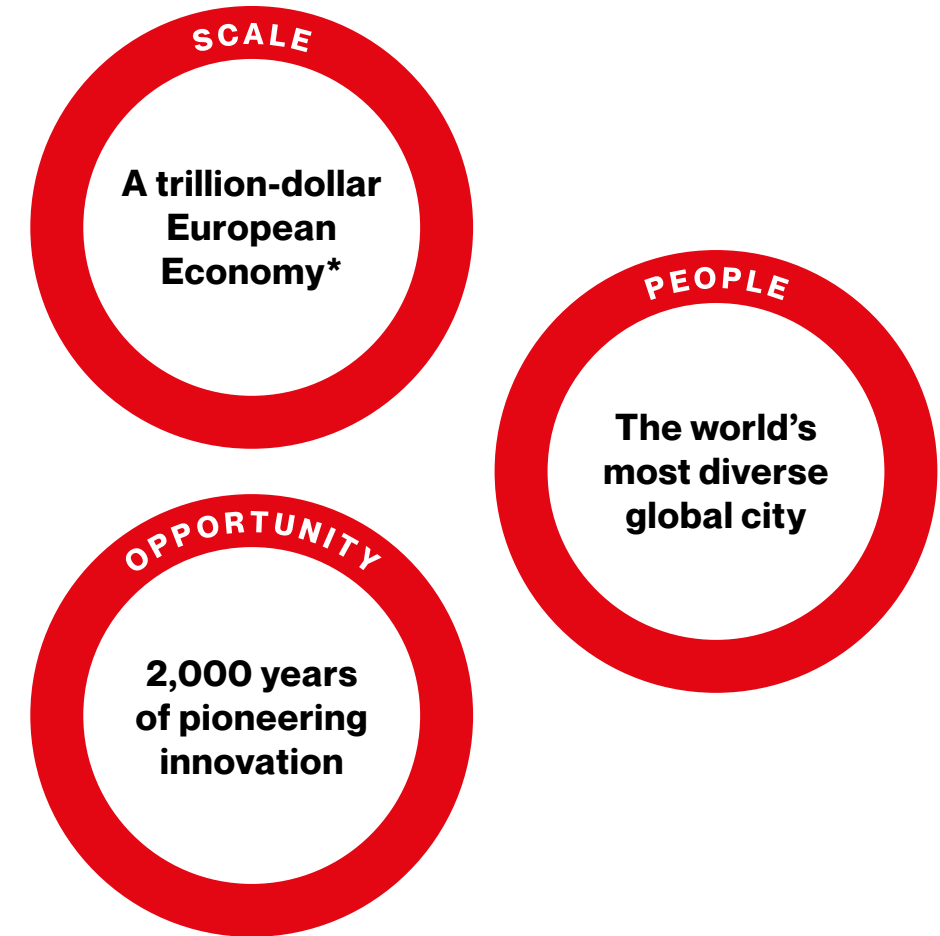
London is a trillion-dollar European Economy* and continues to pioneer innovation in real estate, energy, infrastructure and beyond, and with a commitment to reach net zero carbon by 2030, London remains the most attractive city in the world to invest.

We are the most diverse global city in the world, where people have chosen to live, work and explore for over 2,000 years. We have secure political, financial and legal institutions providing assurance to investors for their long-term stable returns.

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.

Opportunity London is an investors front door, advising and connecting to the latest opportunities into and across London. Please read on and contact us to find out more.

Advantage London



**Source: Urban region GDP estimates by Oxford Economics*

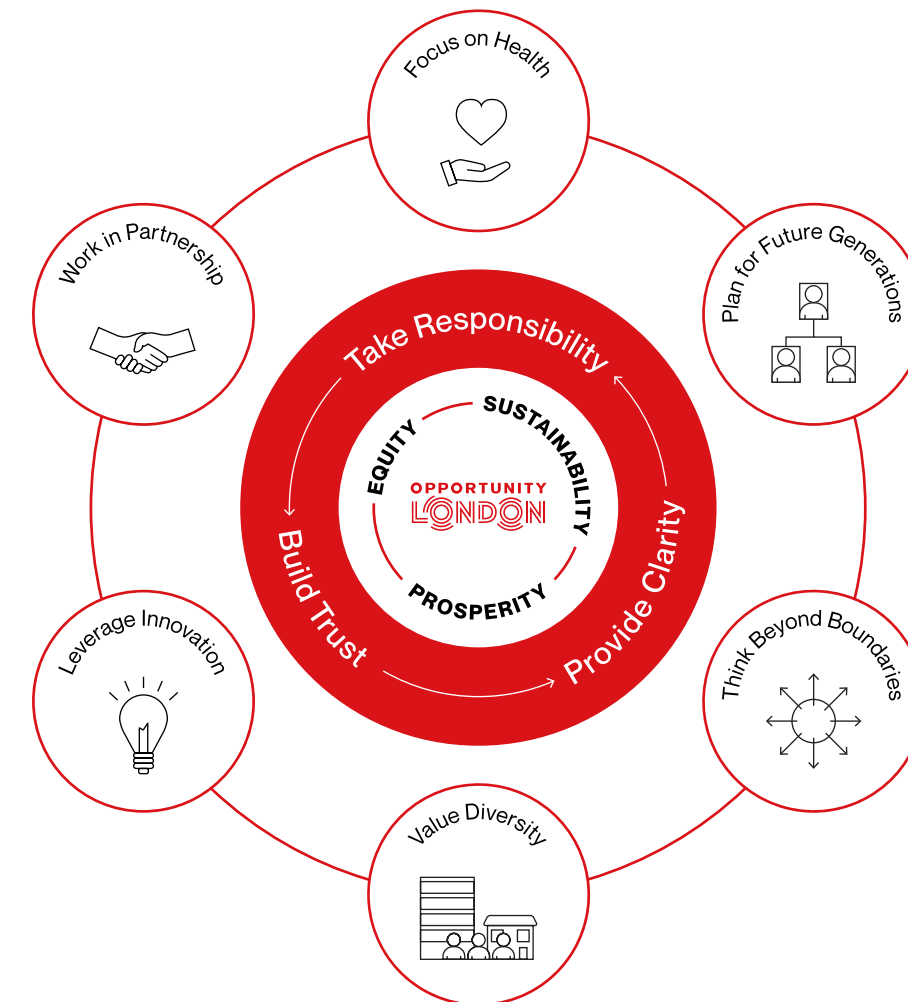


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New London Agenda

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.

There is clear thinking set out about the future of our city in 'The New London Agenda', published in January 2024 by NLA, and Opportunity London is fully aligned with those values.



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, 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.

London is consistently among the largest markets traded globally for international real estate investment, with over £250bn in the past decade.

For more info visit: opportunity.london/why

A Global Financial Capital

- **Europe's top financial centre**, second only to New York globally.
- **Robust financial industry** attracts businesses, investors, and professionals from around the world.
- **Over £20 billion in cross-border investments** in 2022, indicating London's strong attractiveness to global markets.
- **'The world's largest airport system'**, with London's biggest airport (Heathrow) surpassing pre-pandemic passenger levels.

An Innovation and Technology Hub

- **Largest innovation economy workforce in the world.**
- **A thriving ecosystem for startups and established tech giants**, supported by a high concentration of skilled tech professionals.
- **The highest number of \$1 billion+ tech businesses in Europe**, a testament to our supportive environment for technological innovation and entrepreneurship.

A Place of Diversity and Education

- **More than 300 languages spoken.**
- **Unmatched diversity** enriches the fabric of the city, fostering a global outlook and cultural exchange.
- **Four UK universities** in the top eight of the QS World University Rankings 2023, two of them in London.
- **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 world's greenest capitals.
- **The world's largest Low Emission Zone**, encouraging eco-friendly practices and combating air pollution.
- **London's pioneering underground system keeps growing**, with the recently-opened Elizabeth Line extending fast and clean transport to 1.5 million people.

London leads the world in our six Strategic Asset Classes for investment



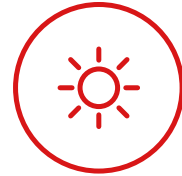
Low Carbon

Including retrofit, sustainable workplace, transport and energy



Life Sciences

Including the Knowledge Economy and Innovation Districts



Leisure & Culture

Including wellbeing, retail, cultural venues and creative production spaces



Logistics & Light Industrial

Including innovative warehousing, distribution hubs and data centres



Living

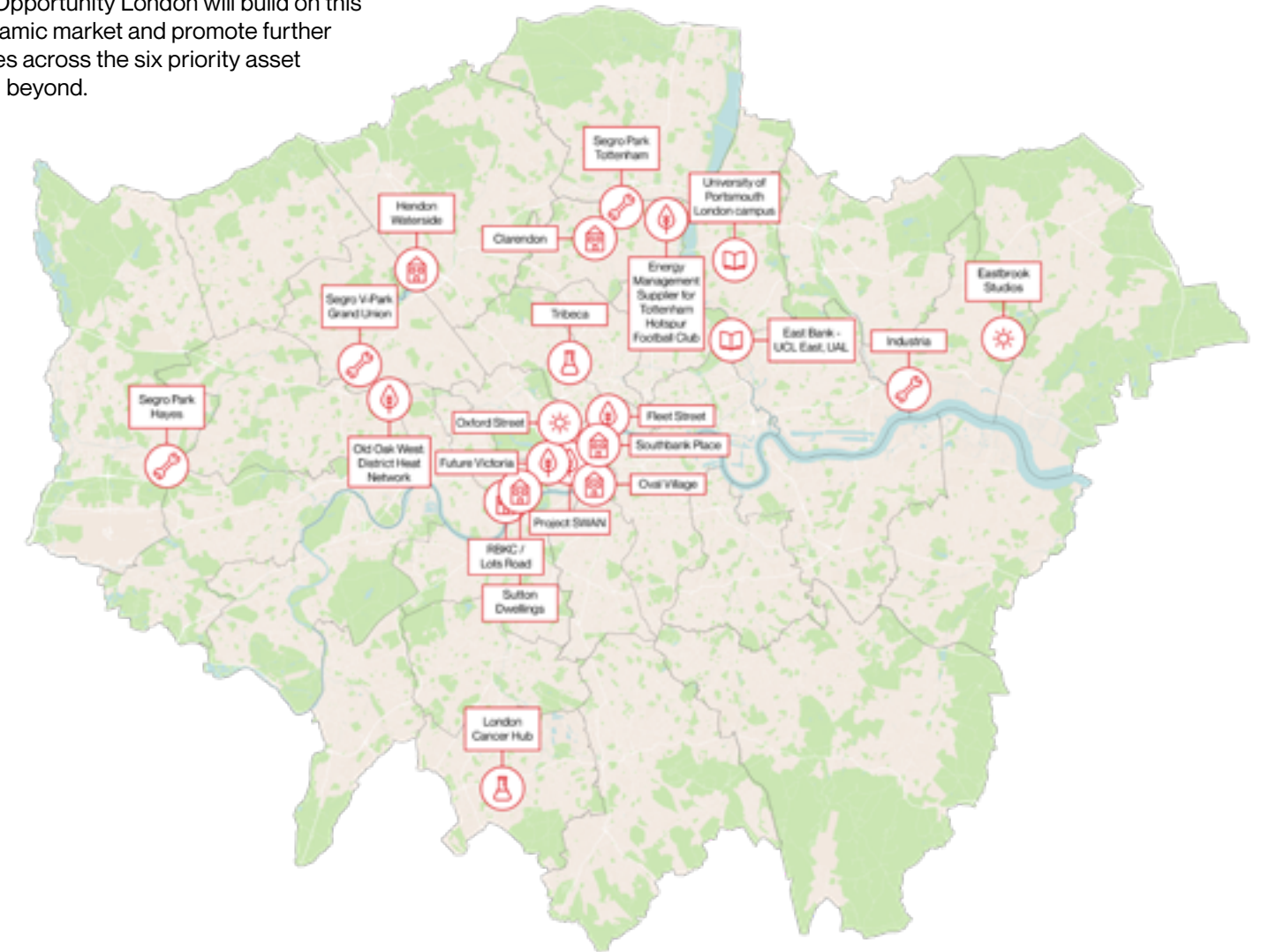
Including build-to-rent, student, co & later living, and affordable housing



Learning & Institutions

Including new facilities for universities, colleges and other major organisations

The map shows examples of recent investments in London. Opportunity London will build on this already dynamic market and promote further opportunities across the six priority asset classes and beyond.



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. Tools to aid your investment journey in London:

- Opportunity London Investor Guide
- Opportunity London Dedicated Support

To support your investment journey in London, visit opportunity.london/how

Opportunity London Investor Guide

With support from Arup, Opportunity London has developed a guide for navigating London's complex planning and development systems. This is a tool for investors and developers to better understand the development journey in London, from identifying a development site through to building a scheme.

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.



- Understanding London's governing bodies.
- Identifying a development site.
- Understanding a development site's potential.
- Making the right connections.



- Realising the benefits of the UK's planning system.
- Navigating key planning documents and frameworks.
- Harnessing the potential of a development site.
- Working up a planning application.
- Securing planning permission.
- Understanding your planning permission.



- Tried and tested routes to delivery.
- Putting together a package of funding and financing.
- Procuring contractors in London.
- Public-private partnerships in London.

WHERE Billions in opportunities across London

Inward investment has transformed London over the last two decades. The West End and the City of London continue to be the beating heart of the UK economy and cultural production. Established industries like financial and professional services, along with growth sectors in technology and life sciences, make London a global leader for talent and innovation.

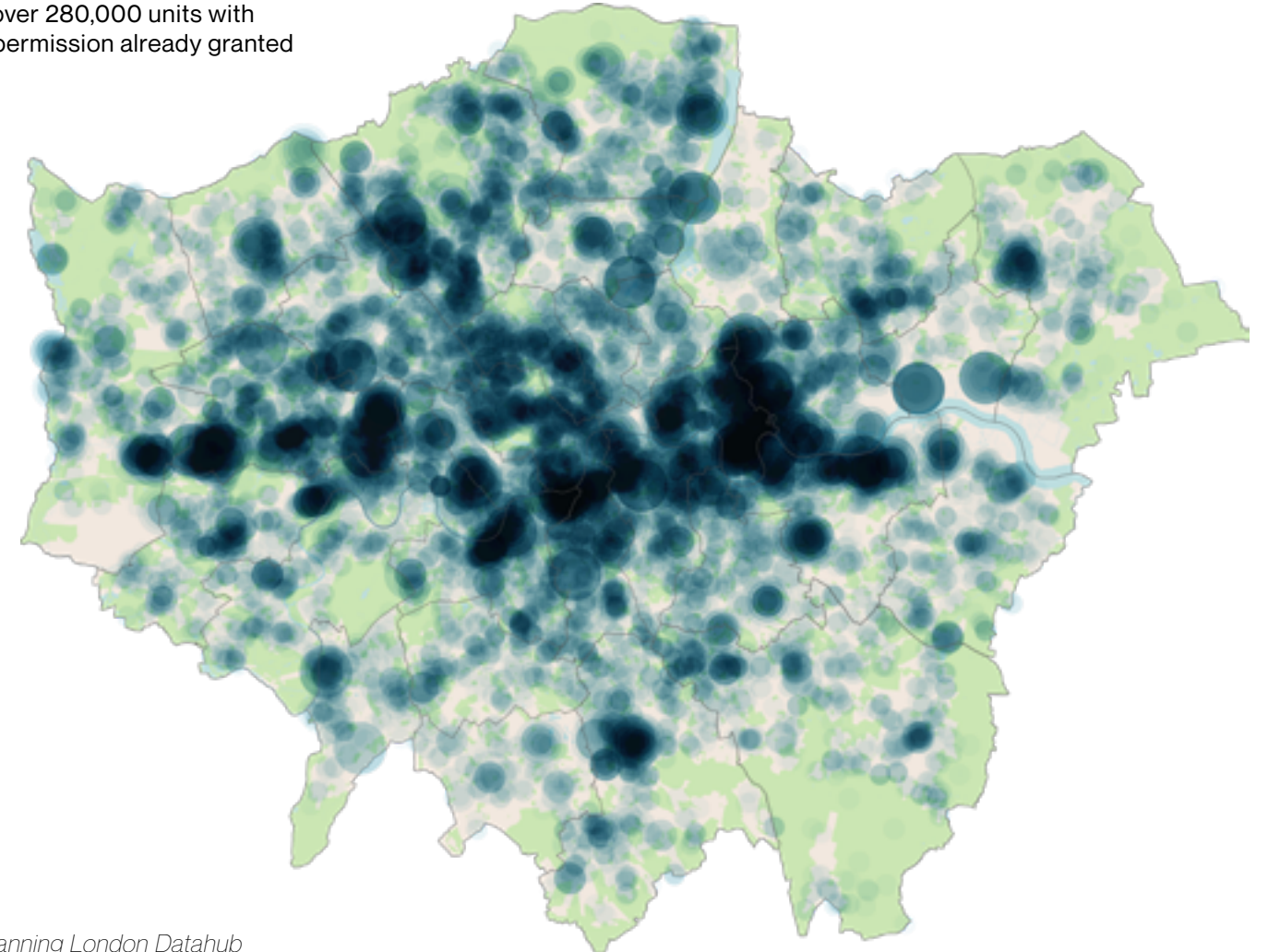
London is also a city of many towns, each with its own unique character and identity. From the bustling streets of Camden to the historic charm of Greenwich and the regeneration hub of Canary Wharf, our neighbourhoods are rich in diversity. Further beyond, outer-London boroughs also unfold as diverse neighbourhoods, from the leafy suburbs of Richmond and the cultural tapestry of Walthamstow to the thriving communities in Bromley, the outer regions amplify the city's richness.

These fundamentals, together with high levels of liquidity, continuously make London one of the most sought-after destinations for global capital. Recently, major investments in Queen Elizabeth Olympic Park, the City Cluster and Canary Wharf, Battersea Power Station or the ever-growing innovation clusters — from the Knowledge Quarter around Kings Cross to White City, London Cancer Hub in Sutton to Barking's creative production and innovative manufacturing clusters, all are proof of London's economic dynamism, with opportunities for growth and development all across Greater London.

For more info visit: opportunity.london/where

Pipeline residential planning applications 2022 / 2023

The London residential pipeline includes over 280,000 units with planning permission already granted



Source: Planning London Datahub

London's Transport Pipeline

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. Our new crown jewel is the Elizabeth Line, which has already become the UK's busiest railway after less than two years of operation. More importantly, it opened up greater opportunities: the Elizabeth Line brought 1.5 million Londoners closer to the main employment and cultural centres. A recent study revealed that submarkets served by the Elizabeth line had a 6% growth (inflation adjusted) in prime rents over the last 10 years and still have 6.5m sq ft undersupply of prime office space.

A number of planned new lines and improvements to existing services will unlock further opportunities.

Map Key

Recently opened

- Elizabeth Line
- Northern Line Extension to Battersea
- Barking Riverside Overground Extension

Major planned lines

- West London Orbital
- Docklands Light Railway Extension to Thamesmead
- Bakerloo Line Extension
- Existing railway lines and stations

Recent and future major transport links



Source: Greater London Authority

PROJECTS

£10.6bn of investible opportunities worth £44bn GDV

The Opportunity London Investment Prospectus presents 12 live investment schemes seeking over £10.6bn of immediate investment altogether. Following its launch in March 2024, two of the featured projects secured investment and five new opportunities have been added with many more projects in our pipeline to be brought to the market this year and beyond.

These schemes have been reviewed for market readiness, and alignment to London's government policies and the values of Opportunity London. Each project has a team ready to engage. Some have an **immediate investment** offer, others are major regeneration schemes looking for an **initial conversation** with potential investors and development partners from an earlier stage.

Opportunity London is also a gateway to wider investment opportunities across all of Greater London. We have a rolling pipeline of investible opportunities which we can discuss with investors based on their specific needs. We can facilitate contacts with all the London boroughs, the City of London Corporation, the Greater London Authority and all our members about bespoke opportunities for different types of investors.

If you would like to discuss any of these opportunities in more detail please get in touch with the Opportunity London team.

1	Broadway Connection, Ealing
	Immediate Investment
2	Bunhill Heat Network, Islington
	Immediate Investment
3	Camden Film Quarter
	Immediate Investment
4	Meridian Water, Enfield
	Immediate Investment
5	Walthamstow Central Interchange Regeneration
	Immediate Investment
6	Barking Riverside
	Immediate Investment
7	Brent Cross Town
	Initial Conversation
8	Earls Court, West London
	Initial Conversation
9	Millennium Mills, Silvertown
	Immediate Investment
10	Old Oak, West London
	Initial Conversation
11	Royal Albert Dock
	Initial Conversation
12	Thames Road, Barking
	Initial Conversation



Broadway Connection, Ealing

Immediate Investment

British Land

Asset class:
Life Sciences, Low Carbon, Learning & Institutions, Office

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

GDV:
£300m

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

Ealing offers the economic activity, bustle and connections of an inner London borough, but the space and lifestyle offer of outer London. Ealing Metropolitan Centre plays a central role in West London's economy, providing a wide range of commercial, retail, cultural and civic amenities, as well as hosting a large portion of the borough's knowledge intensive jobs.

The Broadway Connection site — which is promoted by British Land — is on the doorstep of the new Elizabeth Line, demonstrating investor confidence in the strength of Ealing's position.

300,000 sq ft mixed use redevelopment located directly opposite Ealing Broadway station, with access to Central London in under 10 minutes via the Elizabeth line. The scheme provides 285,000 sq ft of best in class, highly sustainable office accommodation alongside a new public square and a vibrant retail, F&B and leisure offer.

The flagship development will deliver much-needed office space as well as complementary and diverse uses which will reposition Ealing Broadway as a major destination for businesses.

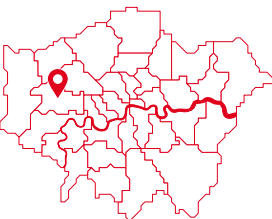
The investment proposition:

Seeking major commercial and education occupiers requiring >100k sq ft pre-let space, designs are flexible and can be adapted to reflect specific occupier needs.

British Land are flexible on deal structure, including joint venture partnership or other structures tailored to investor interest.

Key Facts:

- Full redevelopment of 1.4-acre site with some existing buildings retained & refurbished
- Directly opposite Ealing Broadway station - 12 mins to Bond St and 19 mins to Heathrow
- 285,000 sq ft of office accommodation with 21 storey office tower element
- Office floor sizes ranging from 5,000 sq ft to 22,000 sq ft
- 33,000 sq ft of retail, F&B and leisure over ground and first floors
- New public square and enhanced connection from the station and our shopping centre
- Net zero carbon development, targeting BREEAM Outstanding and EPC A



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Bunhill Heat Network, Islington

Immediate Investment

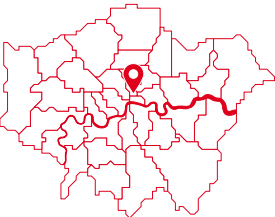
London Borough of Islington

Asset class:
Low Carbon

Planning status:
Finsbury Leisure Centre planning application expected September 2024. Energy Centre and potential Citigen expansion planning application not yet scheduled

GDV:
Total development value £31.3 to £48.2 million

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



Islington plans to expand the Bunhill heat network near Old Street, which supplies heat to 1,350 homes, schools and leisure centres, from two Energy Centres (EC1&2), the second recovering waste heat from the underground.

The proposed City Forum expansion will connect another 1,000 private homes to the network. The development of the Finsbury Leisure Centre site includes provision for 198 new homes, two large heat pumps and an ambient loop with a heat exchanger connection to the Bunhill network. The development will require the relocation or decommissioning of EC1 strengthening the business case for expanding the network .

The investment proposition is to further expand the network and to add a 3rd Energy Centre using waste heat from the nearby Data Centre. Green Heat Network Funding will support the proposal, and the expansion of the network will enable additional connections to commercial off-takers and potentially to the Citigen heat network. The expansion will save an estimated 116,560 tonnes of CO2e over its lifetime.

Future expansions are envisaged.

The expansion of the Bunhill network is one of four development areas in Islington's Heat Master plan, the government funded (DESNZ) Advanced Zoning Pilot and the GLA funded CIEN Local Area Energy Plan. Expansion will accelerate with the implementation of heat network zoning, with the Bunhill operators benefitting from incumbency rights.

The investment proposition:

An enabling policy framework and an outline business case building on a proven model are in place, but the council is unable to access sufficient capital to move the scheme forward. The council is exploring a range of partnership arrangements.

Key Facts:

- £16.85 million 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



Camden Film Quarter

Immediate Investment

Yoo Capital

Asset class:
Living, Leisure & Culture

Planning status:
Yoo Capital have exchanged contracts to acquire the land on a subject to planning basis. Masterplan vision statement submitted in August 2024 and expect to submit a planning application in Q1 2025

GDV:
£1.6bn (Phase I)

Development timeline:
Construction to start in Summer 2025 with delivery during 2027

Camden Film Quarter (CFQ) is the first purpose-built film and television production campus in central London.

The site represents the centrepiece of 36 acres of contiguous freehold land 15 minutes from Berkeley Square, in ‘super-prime’ London.

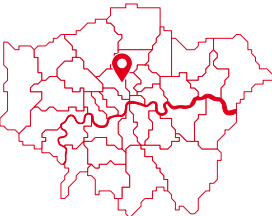
Yoo Capital has formed best in class partnerships with key stakeholders including the British Film Institute and National Film and Television School. The scheme has already attracted interest from major film and television companies, studio tour operators, entertainment companies, hotel companies, residential companies, educational and cultural institutions with 1m sq ft of pre-committed demand either by way of contracts closed or under letters of intent.

The investment proposition:

The project is open for investment and we are currently seeking Limited Partners/co-investors.

Key Facts:

- 36 acres of freehold property, Phase I being 8.5 acres
- 1.4 million sq ft of mixed use property
- 250,000 sq ft of residential of which 50% will be affordable
- 15 minutes north of ‘Super Prime’ London
- Excellent transport connectivity with underground and overground connections at Kentish Town and Gospel Oak



More info: camdenfilmquarter.com

Meridian Water, Enfield

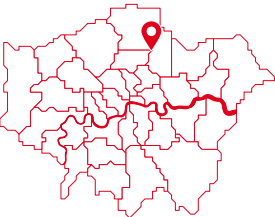
Enfield Council

Asset class:
**Living, Leisure & Culture,
Logistics & Light Industrial,
Learning & Institutions, Office**

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 including proposed allocations within the emerging Enfield Local Plan, due to be submitted for independent examination this Summer

GDV:
£6bn

Development timeline:
Construction has started and will continue for 25 years



Meridian Water is one of London's largest regeneration projects spanning 85 hectares. Having invested £400 million, Enfield Council is the master developer bringing 10,000 homes and 6,000 high-quality jobs to Upper Edmonton in North London, next to the Lee Valley Regional Park. There will be 22 Meridian development parcels coming forward over the next two decades. Meridian One is under construction, delivering around 1,000 homes and commercial space next to the new Meridian Water train station. Further development parcels are being launched to the market in 2025.

With £195 million secured in Government funding, an extensive Strategic Infrastructure Works program is underway. New parks, roads, bridges, environmental and transport improvements are unlocking future development plots. These improvements will also enable delivery of a new town centre, which will form the heart of Meridian Water community. Improvements to the capacity of the West Anglia Main Line (WAML) promise to further boost the connectivity of Meridian Water. Enfield Council is currently working with partners to devise a robust funding case. As part of the successful HIF funding application technical designs have been completed to GRIP 4 stage, so enabling works can start promptly.

Immediate Investment

The investment proposition:

Enfield Council is seeking development partners for a variety of upcoming residential and mixed-use opportunities to deliver high quality transformational regeneration. Partnership arrangements can be structured to meet the needs of the partner and the opportunities presented by individual sites.

Development parcels at Meridian Water are being brought to market, and in 2025 we anticipate M3 and M4 will come forward, with the potential to deliver 900 new homes alongside 194,000 sq ft of student accommodation and over 54,000 sq ft of commercial floorspace.

Key Facts:

- 10,000 homes
- 725,000 sq ft commercial floorspace
- Meridian Water train station opened in 2019 providing excellent transport links
- £195m HIF funding for Strategic Infrastructure Works
- Vibrant meanwhile offer, including a third-party 15,000 capacity events venue

More info: meridianwater.co.uk



Walthamstow Central Interchange Regeneration

Immediate Investment

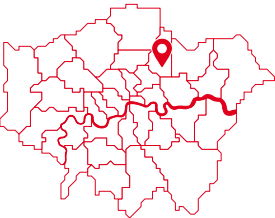
London Borough of Waltham Forest

Asset class:
Living, Leisure & Culture, Low Carbon, Retail/Commercial

Planning status:
Planning permission secured for new underground station entrance

GDV:
Forecast £750mn+ delivering the investment proposition

Development timeline:
Initial, fully funded, phase of station works to be delivered Autumn 2024-Spring 2025



Walthamstow is a major London town centre and the civic, commercial and cultural heart for 300,000 residents of Waltham Forest. Walthamstow is one of the most accessible locations in the city, with over 20m passenger journeys per annum from the northern terminus of the Victoria Line, two London Overground lines and London’s third busiest bus station.

In the last five years, over 1,000 mixed-tenure homes have been delivered, alongside a 950-seat theatre, commercial uses, community infrastructure and the opening of University of Portsmouth’s London Campus.

To sustain this growth investment is required to address capacity and accessibility challenges at Walthamstow’s transport interchange, supporting the shift to low carbon transport. A public-partnership has been established comprising, the Council, TfL and Capital & Regional, long lease holder-operator of 17&Central shopping centre. The partnership have secured planning permission for a new step-free Victoria Line entrance. The first phase of works will be delivered by Spring 2025.

The partnership is seeking partners to invest c.£90m in phased completion of the full station entrance, targeted to open in the early 2030s, in turn unlocking significant further regeneration, including on public sector land, in line with the Council’s adopted Local Plan.

This investment will unlock c.£750m+ GDV phased mixed-use regeneration in the vicinity of the transport interchange and across the town centre.

The investment proposition:

The council is seeking private sector investment and development partners to deliver:

Up to £90m of investment in constructing the new entrance at Walthamstow Central Station, building on £5m investment by the council-led partnership for works completing in 2025.

The c.43,000 sq ft extension to 17&Central’s shopping centre and Town Square public space.

Work in partnership to develop proposals for council-owned, Local Plan allocated sites in the vicinity of the transport interchange for residential-led mixed-use with the potential for 1,500 new homes.

Key Facts:

Planning permission secured by the Council, TfL and Capital & Regional for:

- 538 new homes, c.47,300 sq ft additional retail, business and community floorspace expanding the 17&Central shopping centre (planning reference 202491) and new Town Square
- The new underground ticket hall and station entrance (planning reference 202489)



Barking Riverside

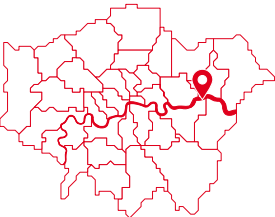
Barking Riverside Limited
(A joint venture between the Mayor of London and L&Q housing association)

Asset class:
Living

Planning status:
Barking Riverside has consent for 10,800 homes, of which 2,500 units have been delivered to date. In August 2024 an uplift planning application was submitted for up to 13,046 homes and 569,000sqft of non-residential floorspace

GDV:
£6.6bn

Development timeline:
Bespoke opportunities with the next phase of infrastructure due to come on stream in the next 12 months, with future construction phases expected every 12 – 18 months



Barking Riverside is one of Europe's largest and most exciting residential developments, providing East London with thousands of new homes. It is a high-profile development scheme, set to be a new town of 60,000 residents in one of the most growth-oriented areas of London. It offers a variety of opportunities for bespoke investment packages with a long-term view.

Benefitting from a unique location directly on the banks of the River Thames, Barking Riverside is comprised of 443 acres of land — an area as large as Hyde Park — on a brownfield site formerly occupied by the iconic Barking Power Station. Connected to central London via the recently extended Overground and river bus services, Barking Riverside is ideal for those who want fast and easy access to London as well as an abundance of green and blue spaces.

Barking Riverside is already home to a diverse and active community of over 6,700 residents. Existing amenities and assets include five schools, one of which is an Ofsted Outstanding secondary school; two community hubs; cycling and walking routes; 80 hectares of ecology habitat.

The investment proposition:

Upfront infrastructure to, in turn, unlock funding for social infrastructure.

Funding the construction of residential and commercial properties via the appointed Barking Riverside plot developers.

Key Facts:

- 443 acres of land
- 20,000 new homes
- London's only Healthy New Town NHS initiative
- 30 minutes by train to the City and to Stratford
- Winner of the Community-led Placemaking category at the Planning Awards 2021

More info: barkingriverside.london

Immediate Investment



© Barking Riverside Limited

Brent Cross Town

Initial conversation

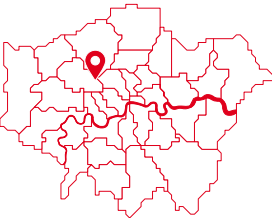
Related Argent, in partnership with Barnet Council

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

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

GDV:
£8bn

Development timeline:
Phased Project under construction with ongoing investment opportunities



Brent Cross Town is a 180-acre park town development being delivered by Related Argent, in partnership with Barnet Council. One of Europe’s largest net-zero regeneration projects, this pioneering mixed-use new town is set alongside 50 acres of parks and playing fields.

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. The new mainline train station Brent Cross West is open and connects Brent Cross Town with St Pancras International in as little as 12 minutes. Seven buildings are under construction comprising over 930 homes across a mix of tenures, with the first residents moving into the town in Autumn 2024.

In Spring 2024, construction started on the first office building, 3 Copper Square, located next to Brent Cross West station in the heart of the town’s business and innovation district. Sheffield Hallam University will open its first satellite campus outside Yorkshire at Brent Cross Town, and a joint venture between Audley Group and Senior Living Investment Partners (Octopus Real Estate and Pension Investment Corporation) will create later living apartments with around 150 homes.

The investment proposition:

There will be multiple investment opportunities through the 15+ year delivery lifecycle of Brent Cross Town.

£148m secured from Homes England in December 2020 to fund the land assembly and infrastructure.

A joint venture between Related Argent and Invesco Real Estate formed at the end of 2022 to deliver £600m of Gross Development Value, including 800 homes as well as retail by 2025.

Green Loan financing, which is lending dedicated to sustainable projects, including a £97m green construction loan provided by LaSalle Investment Management and a £62.7m green construction loan provided by NatWest.

A joint venture formed in May 2024 with NTT UD Europe Limited, a subsidiary of leading Japanese telecommunications company NTT, to deliver the third Build-to-Rent development at BXT, which will create over £200m of GDV and bring a further 226 rental homes across three blocks.

More info: brentcrosstown.co.uk



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Earls Court, West London

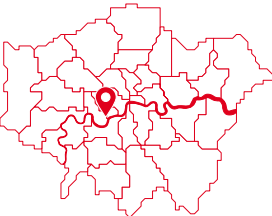
Initial conversation

The Earls Court Development Company

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

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

Development timeline:
Initial investment activity 2024 – 2025. Development will commence in 2026 with the first residents and occupiers set to move to the site from 2029



The Earls Court site is Central London's largest cleared development opportunity. Comprising c.40 acres of land, formerly housing the Earls Court Exhibition Centres, it sits within the boroughs of Kensington & Chelsea and Hammersmith & Fulham. A new masterplan for a mixed-use development of 7.5m sq ft has been submitted, with the ambition to create the heritage of the future through exemplary design and sustainability.

The Earls Court Development Company (ECDC) is an Earl's Court based business, responsible for driving the redevelopment of the site, on behalf of the Earls Court Partnership Limited — a JV between Delancey (on behalf of its client funds), the Dutch pension fund manager APG, and Transport for London (TfL).

ECDC invites people to discover wonder at Earls Court with the transformative development of London's iconic site of human ingenuity; delivering a celebration of nature's ability to connect and revive; a showcase for climate and clean innovation and skills; a cultural eco-system for the future of talent; and an inspiring neighbourhood designed for all stages of life.

The development is set to bring c.4,000 homes, 2.5m sq ft of workspace and 12,000 jobs set within a landscape-led development where 20 acres of public open space allows nature to flourish. With three anchor venues, culture and creativity will thrive in a place which brings communities together through entertainment and innovation.

The investment proposition:

Earls Court is a unique opportunity to rethink a high value Central London site of considerable scale. A multi-phase development introducing a broad mix of property uses across the masterplan and PHASE 1 being brought forward by UK public and private sector and international investors. Opportunities for involvement across residential sectors, offices, culture and logistics.

Key Facts:

- c.40 acres cleared development site in Central London, 3 tube stations adjacent.
- 7.5m sq ft mixed use masterplan - a showcase for climate and clean innovation and skills.
- 2.5m 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 first phase of development (start on site from 2026).

More info: earlscourt.com



Millennium Mills, Silvertown

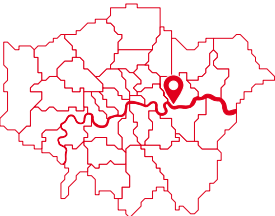
The Silvertown Partnership (Lendlease and Starwood Capital)

Asset class:
Low Carbon, Office

Planning status:
Planning permission was granted in 2019 and amended in October 2023 to reflect the current market expectations from occupiers

GDV:
£160mn

Development timeline:
Millennium Mills has been granted planning permission and earliest completion date would be 2028



Millenium Mills, part of the £5.2bn Silvertown regeneration, is an iconic, listed heritage building being reimagined to offer flexible workspace for next generation businesses that will feature breakout spaces on the ground floor and rooftop gardens with stunning views over East London.

Once a flour mill, its storied history and heritage are meticulously preserved and celebrated in the new design. The project exemplifies sustainability, boasting low embodied carbon due to the reuse of its existing frame and façade. As part of the wider scheme Silvertown & Millennium Mills will benefit from the UK's first EctoGrid, harnessing energy from local industrial units.

Spanning 225,000 sq ft NIA, Millennium Mills will foster a thriving ecosystem of like-minded businesses and will be complemented by new build workspaces from the 2030s onwards. The building will anchor the northern side of 'Mills Square', and boast uninterrupted views of the dock.

The 60-acre site will be home to two creative clusters Mills Square, and Silverworks, East London's hub for creative production with TV and film studios, music recording studios, performance spaces, and rehearsal areas. Upon completion, Silvertown will offer 1.2m sq ft of new workspace in London's only enterprise zone, provide c.6,500 homes for all stages of life with 50% being affordable, create c.7,000 jobs for residents, and be just 15 minutes from the West End via the Elizabeth Line.

Immediate Investment

The investment proposition:

The development JV (The Silvertown Partnership) is seeking a capital investment partner committed to long term capital growth and delivering significant environmental and social impact. Once funding is acquired the building is ready to move into its construction phase immediately.

Key Facts:

- Millennium Mills will be made of two buildings. 'The Spillers Building' and 'The Mills Building'. The two together create the one icon totalling 225,000 sq ft
- The building is just 5 minutes walk from Custom House Station on the Elizabeth line with access into Central London, as well as the DLR to the UEL campuses at The Royal Docks and Stratford as well as Bank Station
- A famous landmark used in TV, Film, Music & Fashion. It was featured in TV series 'Ashes to Ashes' and the 2022 'The Batman' film. From the late 80's, the building gained popularity within the music industry, being used as the backdrop by Arctic Monkeys, Snow Patrol and Coldplay

More info: [silvertown.co.uk](https://www.silvertown.co.uk)



© Artist impression, Lendlease

Old Oak

Initial conversation

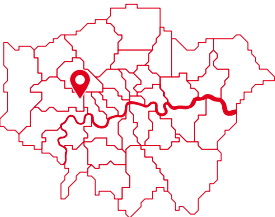
Old Oak and Park Royal Development Corporation (OPDC)

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

Planning status:
OPDC is committed to accelerating delivery and ensuring development is well underway by the time Old Oak Common station opens between 2029-2033

GDV:
£9.8bn+

Development timeline:
It is expected that OPDC will begin developer and investor procurement in the next 12 months



Old Oak is a major regeneration project in a strategically important location. It will become a new urban district on London’s largest brownfield development site, adjacent to Old Oak Common (OOC) Station which will be the interchange between HS2 and the Elizabeth Line — two of the nation’s most significant and transformational transport investments. Park Royal, the UK’s largest industrial estate and a major London employment centre, lies to its west.

Old Oak is significant for national and regional growth. The project has an estimated Gross Development Value of over £9.8bn. It will deliver 9,000 homes (with up to 50% affordable housing) and 3m sq ft of workspace that will create 11,100 jobs, as well as many other positive wider area impacts.

The investment proposition:

Seeking long term development and investment partnership.

Key Facts:

- 9,000 homes
- 3m sq ft employment space
- 25 acres public realm
- 6 acres of parks and green space
- 1km canal enhancements



© OPDC

Royal Albert Dock

Initial conversation

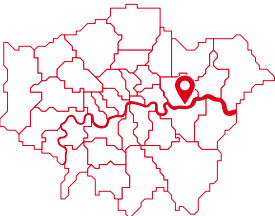
Greater London Authority (GLA)

Asset class:
Living, Leisure & Culture, Logistics & Light Industrial, Learning & Institutions

Planning status:
Partially implemented hybrid consent; new planning application expected from development partner. Site within Royal Docks and Beckton Riverside Opportunity Area and Local Plan allocation

GDV:
£3bn

Development timeline:
Opportunity ready to take to market, launching early autumn 2024



The Royal Docks is the Mayor of London’s largest land-led regeneration project with over 175 hectares of land in GLA ownership. It will attract approximately £5bn worth of investment over the next 20 years, delivering up to 36,000 new homes and 55,000 new jobs. The area is set to become one of the most diverse residential, business and visitor destinations in the capital. This is set out in the Royal Docks delivery plan (2024-2029): royaldocks.london/articles/delivery-plan.

Royal Albert Dock is one of the Royal Docks’ key development sites, offering the opportunity for significant value creation (economic, social and environmental) in London’s only Enterprise Zone (EZ). A procurement exercise will select a new delivery partner with a focus on long-term investment and maximising the sites development opportunity. This will create a new mixed-use employment hub and new residential communities. The site is circa 30 acres in size. There is the opportunity for c.4m sq ft of new mixed-use development.

The site is bounded by educational uses (University of East London) to the east, and a variety of leisure, hotel and exhibition centre uses (London ExCeL) to the West. To the north is large-scale transport infrastructure in the form of Royal Albert Way and the DLR; to the south is the historic Royal Albert Dock water body and London City Airport. Two DLR stations directly serve the site. The Elizabeth Line is 2mins away on the DLR at Custom House.

The investment proposition:

Seeking an innovative development partner to deliver a transformational new employment-led, mixed-use vision for the site.

Key Facts:

- 30 acres site.
- 4m sq ft of development potential
- Served by two DLR stations. Elizabeth Line four minutes away by DLR

More info: royaldocks.london/royalalbertdock



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Thames Road, Barking

Initial conversation

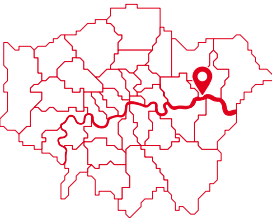
Be First, London Borough of Barking & Dagenham

Asset class:
Living, Logistics and Light Industrial

Planning status:
Councils sites are at pre-planning design stage and 4x third party planning applications have been approved for planning permission subject to GLA approval

GDV:
£1.83bn

Development timeline:
Practical completion of the masterplan in its entirety is anticipated to be a 21 year project



An opportunity to joint venture with the London Borough of Barking & Dagenham in the second phase of its transformation of Thames Road, an area of underutilised brownfield with significant (40%) Council land ownership and a vision to create a new, densified neighbourhood of some 3,500 homes alongside modern industrial and commercial uses. The Factory District is a new destination for east London, capitalising on London's entrepreneurial spirit. It will combine an employment-led, mixed use community with new homes for working Londoners and facilities for London's industrial sector.

The first phase comprised: Industria, completed in September 2023, and which is setting the standard for sustainable, multi-storey industrial workspace comprising of 45x units with flexible lease terms; and 12 Thames Road, another Council-led scheme, which is due to complete in Summer 2024 and co-locates industrial (54,000 sq ft) and residential (156x affordable units). Other third-party and work-live schemes have also been submitted for planning approval.

In this second phase there is scope for joint ventures across standalone sites or across a package of sites, alongside tactical urbanism projects relating to the streetscape and infrastructure which offer scope to implement 'smart city' and 'smart energy' technologies. Delivery from this second phase is forecast to comprise up to 1,865 homes and c.204,000 sq ft of industrial commercial floorspace.

The investment proposition:

Joint Ventures across standalone sites or across a package of sites, alongside tactical urbanism projects relating to the streetscape and infrastructure

Key Facts:

- Up to 3,500 homes
- 475,000 sq ft industrial
- Thames Road Vision, Design Code and Place Strategy available here: oneboroughvoice.lbbd.gov.uk/thames-road-vision

More info:
befirst.london/thames-road-the-factory-district



London's Net Zero Pipeline

The London Net Zero Projects Pipeline is the most comprehensive available database of the infrastructure projects needed to deliver on borough climate change targets; today, it represents a £34 billion investment opportunity across 938 projects.

The pipeline illuminates local net zero infrastructure needs in every area of the city, across building retrofit, renewable energy, transport, waste and green infrastructure. Developed by London Councils and the GLA, with support from 3Ci — the Cities Commission for Climate Investment — the pipeline enables us to understand the support needed to bring projects to delivery, the supply chain opportunities that underpin this need, and how London government can work with developers, utilities, investors and national government to build the market for appropriate the right public and private investment into this infrastructure.

To facilitate this, London Councils and the GLA worked with London boroughs in early summer 2024 to update the pipeline. They are now working to understand the technical and commercial advice, funding and financial models needed to unlock delivery of the projects on the pipeline. Looking forward, they are examining how to evolve the pipeline into a live resource that can create value not just for London government, also for its partners.

For more information, please contact:

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SEGRO Park, Courier Road



Tottenham Court Road Elizabeth Line Station and the Outernet Building

Opportunity London and central London's Business Improvement Districts

Opportunity London may at first glance look and feel like a novel addition to London's inward investment landscape. But in some ways, it is part of a near four decades' old tradition of the public and private plus third sectors coming together to promote the interests of the city.

Ironically, the seeds for this partnership approach were sewn when Mrs Thatcher famously abolished the Greater London Council in 1986. Little did she perhaps realise that the vacuum created would be filled by a range of organisations which saw the need to champion the city and promote its interests both domestically and internationally.

Remarkably, since the restoration of city-wide government in the form of the GLA along with its functional bodies at the turn of the century, the 1990s momentum created by NLA, London First (now Business LDN), the CBI, London Transport (TfL), the City and boroughs has been sustained. London's set-up might not be as slick or regimented as some of our major international rivals but in some ways that is to our advantage. Our more "organic" model of promotion is arguably, more nimble, flexible and hopefully effective.

Business improvement districts such as the Central District Alliance and Hatton Garden which serves businesses in and around Holborn and Farringdon is one of a number of BIDs that are signed up to Opportunity London. We see real potential associated with speeding up inward investment and bringing more of it to the capital.

Understandably, much of Opportunity London's focus is on major development sites and infrastructure opportunities that don't venture much into the heart of the city. But London is truly an economic ecosystem. This means that the benefits of helping to get resources flowing into major housing schemes, new rail lines, energy infrastructure or major station development will be felt across the city; they make living and working across Greater London more affordable, attractive and sustainable.

Central London's economy generates more than 10 percent of the country's output. But it only works if other parts of the city (and indeed country) are functioning well. By coming together to ensure London as a whole receives its fair share of global inward investment (and public resources) we can look with confidence to a more prosperous future for all Londoners.

Alexander Jan is chair of the Central District Alliance and Hatton Garden BIDs. He is also chief economic advisor to the London Property Alliance.

**Opportunity
London has an
ongoing pipeline
of investible
opportunities,
which will
be regularly
updated for the
market**

Our ongoing pipeline includes:

- Euston station area regeneration, a 60-acre, Zone 1 landmark transformation scheme
- Major revitalisation schemes in Barnet, Croydon, Lambeth, Lewisham and Sutton
- Significant Life Science and Innovation Sites in London's Knowledge Quarter & West Tech Central
- Multimillion pound development projects by the City of London Corporation.
- Pioneering heat networks across London with E.ON
- London Zoo transformation with ZSL
- A portfolio of regeneration schemes from Places for London and Network Rail and place based public realm in Fleet Street Quarter BID in the heart of the City
- Multi-billion-pound investment opportunities anchored on Victoria Station and neighbourhood including a world leading District Heat Network

Map Key

-  Opportunity Areas
-  Investment Opportunities
-  Borough Boundaries

For transport key see page 13

Opportunity London Map



A Unique Partnership for London

A partnership led by



Enabled by



Team London Partners:



Team London Supporters:



Lead Advisors



Affiliated With



Programme Advisors



Let's Talk

To learn more about Opportunity London and each of the opportunities in this prospectus, please contact our team.

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