



# London Real Estate Forum 2023 Report

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# Foreword

by Benjamin O'Connor, Director, NLA



LREF is a crucial part of our mission at NLA, bringing together the built environment community to shape a better city. To celebrate our 10th anniversary in the Barbican this year, there was no better conference theme than value. LREF is about more than just physical structures; it encompasses the ideals and aspirations that shape our city and ultimately our society.

Over the past decade, LREF has grown from around 900 attendees at Berkeley Square (where our focus was largely on Central London) to over 1600 people at the Barbican Centre involving the whole of London and the UK, plus international cities. The forum has become a pivotal event in the sector, bringing together stakeholders from London and cities around the world to address shared challenges and find collaborative solutions. It plays a crucial role in shaping the future of real estate by facilitating dialogue and fostering innovation, a place where conversations can lead to very tangible and exciting new projects and partnerships.

We face several critical challenges in London this year: the widening skills gap, concerns over supply chains, cost of living, the race to Net Zero, and a growing socio-economic gap in our capital city. Over the course of LREF 2023 we heard from decision-makers, strategists, and thought leaders from across the sector on how to tackle these challenges; it was another opportunity to encourage collaboration between the public and private sectors. Together, through collaboration and shared vision, we have redefined what real estate means to the people.

But after 10 years, what does this really mean? It means recognising that the buildings that shape our skylines must serve a purpose beyond the aesthetic and beyond financial gain. They must align with the needs and aspirations of the people who live and work in London, adding value and opportunity for all.

Real estate has the potential to shape more than just the economic well-being of our cities. It is our duty to ensure that it does so in a fair and equitable way. This means truly listening to our peers and communities, always being open to learning, and striking a balance between progress and preserving value.

Once again, LREF this year was a testament to the power of partnership, the value of social responsibility, and the potential for lasting change. We are eternally grateful to all our partners, contributors and to everyone who joined to share your knowledge, insight, and ideas for the future of city-making.

**1600**  
delegates

**108**  
speakers

**20**  
stage sessions

**8**  
roundtables

**112**  
roundtable participants



# Opportunity London Investment Summit

Taking place the day before LREF, the second annual Opportunity London Investment Summit brought together local authorities, developers and investors for a special event at Mansion House to promote long-term, sustainable investment into London's boroughs and communities. This year's Summit introduced the inaugural CEO Jace Tyrrell, who brings a wealth of experience promoting London's interests.

The public-private partnership is established by NLA and London & Partners. Opportunity London is backed by London Councils, the Mayor of London, the City of London, London's Business Improvement Districts, and a broad range of senior business leaders.

Visit [opportunity.london](https://opportunity.london) to find out more about the campaign and future events, and find it on X (Twitter) [@opportunityldn](https://twitter.com/opportunityldn)



**'London is a diverse and dynamic hub for innovation and investment, fizzing with talent, creativity and potential. Opportunity London has a vital role to play in promoting and helping secure much needed investment right across our great city in projects that will help create the homes, jobs and low-carbon infrastructure that will ensure good growth that benefits London's communities and UK plc.'**

Sadiq Khan, Mayor of London





**‘Boroughs are determined to attract investment into our communities and ensure Londoners benefit from economic growth and new opportunities. This approach is vital for tackling so many of the capital’s key challenges, such as driving long-term investment into the affordable housing London needs. We are committed to working with each other and our partners in securing London’s future as a fairer, greener, and more prosperous city.’**

Cllr Claire Holland, Leader of LB Lambeth, and Acting Chair of London Councils



**‘London is on the verge of becoming Europe’s first Trillion-dollar Urban Economy. In order to maximise this trajectory and continue to attract global capital, Opportunity London was set up in 2022. It brings together the Mayor of London, London Councils, the City of London and leading asset owners, developers and Business Improvement Districts (BIDs) across the Capital to set out and showcase the next wave of investable schemes across real estate, regeneration, infrastructure and energy, with a top focus on affordable housing, life sciences and green assets. The 2023 annual investment summit, held at the Guildhall in the City of London, brought together Opportunity London partners and top global and institutional investors where the current market trends and investable opportunities were shared.’**

Jace Tyrrell, CEO of Opportunity London



# Why we need LREF

by Prof. Greg Clark CBE FAcSS, NLA Senior Advisor on global cities and urban innovation



Attending LREF on 27 September was a bit like going to a wedding. Lots of people one hasn't seen for a while, dressed up nicely, at an important venue, and eager to reconnect. What's not to like?

Our city, London, can easily host 1600 people who want to talk about real estate as an asset/product/service/experience. Trophy buildings, affordable homes, magnetic spaces, construction technologies, place innovations, investment flows, and much more were on the agenda. Oh and, of course, second staircases, lift shafts and wells, use changes, and stranded assets. It was one of those days when it felt like every discussion was inexhaustible and could have gone on and on.

For me, the day was anchored the introduction of Places for London at 08:30. Places for London is the new name of TfL's Property Company. This is an important story about under-used public land, and how we can optimise it for London and Londoners. As Graeme Craig, Places for London CEO, explained, TfL has a c £2Bn property portfolio that is now the focus of our new company. There is property at most of London's 272 underground stations and 78 bus garages. There are hundreds of car parks and there are depots, engineering works, sidings, and goods yards.

The company already has 850 Railway Arches tenanted by London's funkiest businesses, and we have 2000+ SME tenants, are seeking to build 20,000 new homes with 50% affordable, as well building new

low carbon and high experience offices above stations, EV charging capabilities just where they are needed, and, in some locations, we plan to lead large scale town centre renewal. If you put the TfL land together with adjacent owners such as Network Rail and London Boroughs, the opportunity expands.

Places for London is London's new Great Estate. It reaches back both to the lessons we can glean from the Crown Estate, Grosvenor, The City of London and others. It is Cathedral thinking in the metropolitan sphere. It also rekindles a key feature of TfL's past with the 'Metro-Land' approach of linking new property development to transport network expansion, so that the first can help pay for the second. This is how the Piccadilly and Metropolitan lines were originally financed. Of course, this thinking also featured in the DLR, Jubilee line extensions, the Northern line extension and the Elizabeth line. The LREF session on housing saw Places for London and Network Rail talking together about the potential for site coordination to go for 40,000 new homes.

So, why do we need LREF? I thought of five key points over the day at the Barbican.

First, Real Estate is a 'hands on' industry as we know. So much of the knowledge and ideas that need to be shared are practical, visual, operational, and highly nuanced. Conversation, supported by maps and models, is perhaps the only way to share what is meaningful. So, we must gather together to do it.

Second, London needs multiple real estate solutions if our reinvented world city is to be successful. That means we need to keep up with new formats and business models and consciously observe our real estate evolution as we transition from a 7 million person to a 10 million person city, from a finance and professional services hub to a broader set of leading sectors, or a high carbon city to a low carbon city. Recognising the role of real estate in enabling these transitions, and understanding the new modes, is key.

More broadly, and thirdly, the Real Estate industry is undergoing a profound wave of transformation fuelled by technology, climate, social imperatives, and the post-pandemic changes in demand and supply patterns. We are in a rich phase of innovation. As always in innovative sectors, it is face to face engagement that accelerates progress. Our innovation eco-system needs convening and activating if we are optimising that inventiveness.

Fourth, London's Real Estate sector needs a shared voice and a common mind. There are so many areas where we need to advocate effectively to expand the scope and improve the conditions in which we work. We have no chance unless we are organised.

Lastly, we increasingly need to work together at a larger scale to find mutual solutions to key challenges, whether it is raising our own bonds or providing mutual guarantees, or working together on the most difficult sites, there are some challenges that can only be addressed by larger alliances that will share risks and costs together.

So, that why we need LREF. But it is also why we need the New London Agenda, to spell out not just the journey we are on as a city, but also how the built environment can be the active ingredient in achieving the transition and building a new prospectus for London.



# A decade of development

by Nick McKeogh, Co-Founder & Chief Executive, NLA



The first edition of LREF in 2013, pictured, was held in marquees in Berkeley Square and came hot on the heels of the hugely successful London Olympic and Paralympic games.

Focused largely on central London offices and high-end residential development — and sharing a venue with the Glamour Awards where Daniel Radcliffe had won ‘Man of the Year’ the night before — it was, like every edition since, very much of the moment.

Quickly the event expanded its horizons to encompass development of all types across the capital and became the go-to annual event to test the temperature of the market and hear from the most enlightened thinkers from across the public and private sector.

NLA applied its unique network and knowledge to develop the conference and think-tank formats of the Forum and invited in the Next Generation and School groups to participate in a high-profile industry event of this type for the first time.

One of the most prescient LREF conference themes came in 2019, when the conference focused on ‘People not Property’, only six months before the onset of COVID brought the discussions covered into sharp relief as long-term trends were rapidly accelerated by the pandemic.



Agnese Sanvito

An inevitable year off in 2020 allowed LREF to adapt to a changed landscape — moving to the Barbican in September 2021 (deftly delivered between lockdowns) — and with leaders from other UK City regions invited to join the conversation about how we can shape better cities for all.

This year's LREF saw an overarching mood of reflection and reimagination from contributors, as the industry sought collectively to find ways to tackle the dual priorities of climate change and inequality amidst a challenging economic and political landscape.

Nonetheless, there was an air of optimism in the room as problems were shared and new partnerships and opportunities formed, which continues to be the lifeblood of the event.

We look forward to welcoming you again in September 2024!



James McCauley

# OPPORTUNITY LONDON



London remains the most attractive city in the world to most because of its people, its diversity and its dynamism.

2026 is Mayor's commitment to reach net zero carbon by 2050. Leaders from across the London boroughs are seeking partners who share their vision to deliver long-term investment to provide social, environmental and economic benefits for their communities and secure London's place as a green and open world city.

To find out more scan the code below to visit Opportunity London



# VALUE

Value is attached to a myriad of concepts including the value of a company or a property, shareholder value, fair value, and market value. Increasingly as an industry, we want to develop, deliver and track the value we have to the cities we work in and the citizens we work for. Buildings, places and infrastructure can add value by supporting environmental, economic and social wellbeing, and ultimately improving quality of life.

What are our values as an industry and how do these impact our businesses, our procurement and the kinds of places we deliver?

From social value to market value, this year we look at the multiple benefits of conceiving, delivering and managing successful places. Now is the time to agree on a common language that defines, measures and delivers value for the future of our cities.

Value is the motive behind all action. Here we present projects that add value to the places and people they serve.

Summa A-C  
Summa D-I  
Summa K-O  
Summa P-S  
Summa T-Z

# Getting good value — meeting the challenge

by David Taylor, Editor, NLQ



If there was one word that cropped up more than any other at this year’s LREF, it was ‘challenging’.

Mostly, that was related to the backdrop of the tricky financial waters we’re all negotiating, with the ghosts of Brexit and COVID still looming large. But it is now also reinforced by the cost of living crisis and a lack of certainty and leadership being provided by government in the national picture, and in the run-up to a general election.

Happily, though, there was also another word to consider that formed a thread through many of the sessions in the Barbican this year, too. And that was ‘Value’, LREF’s latest theme, moving on from last year’s ‘Think Beyond’. This is something which had ramifications and resonances from how to achieve value in construction with fewer resources — not least for the sake of the planet — right through to social value, so that projects and schemes can deliver benefits that reach far beyond just the bricks and mortar.

The conference this year, as last, kicked off with a state of the market session, where assembled speakers chewed the fat over the micro- and macro-economics affecting — and being affected by — the built environment sector’s performance.



There were still the swirling ‘headwinds’ mentioned last year, but actually, London’s performance is not quite as bad as we might think, said Alex Jan of CDA and LPA, in an attempt to be upbeat. Certainly, that is the case when one looks at indicators like vacancy rates, comparing the UK capital to places like Manhattan in New York (although not to Paris). ‘We kind of perform pretty well, compared to our peers’, said Jan. And the office market in central London, he claimed, is doing well, with ‘excellent new buildings with high environmental credentials’.

A bright start. Panel chair Professor Sadie Morgan had already attempted to set the tone in an opening address that called for a ‘Hippocratic Oath for development’ to ‘do no harm’, proceeding to suggest that value, in the end, is about creating balance — between economic benefits and environmental harmony, excellence and social equality. But in a way balancing his own positive messaging on offices, Jan was more down on a political climate in which making real advances was proving difficult. ‘Businesses are desperate for some certainty and stability around policy’, he said, whether that is the M&S decision, the two staircases requirement (on all towers over 30m) — or HS2.

**‘You could not have engineered a worse policy outcome on HS2, whether you are for the scheme or against it.’**

Alexander Jan, CDA and LPA

Sat alongside Caroline Taylor of the Treasury, Jan pointed to the example of HS2 as an important piece of infrastructure that had clearly gone awry, somehow managing the ‘policy miracle in cheesing off’ everybody in the process. ‘You could not have engineered a worse policy outcome on HS2, whether you are for the scheme or against it’, he said. And then there were other ‘timebombs’ to come, with big issues on energy and business rates. ‘We have got to confront



the failure of the machinery of government. We cannot go on living in a world in which we have a one-size-fits-all policy from Whitehall and politicians who are remote from the actualities of delivering improved leadership’.

Taylor’s response was in part that people still have the appetite for major infrastructure schemes in the future because ‘where there’s risk, there’s opportunity’. ‘I’m optimistic because I’m seeing really good dialogue’, she said. ‘It’s a conference about value and its many dimensions and I think what we need more than anything at the moment is the ability to deliver much needed infrastructure and transformation’. It takes decades to deliver such transformations, however, and is incredibly ‘challenging’, she added, in...‘an incredibly challenging era for public finances’. ‘We have to remember how fiendishly complicated it is to do these things’, not least given a series of economic shocks from Brexit and the like.

But when it comes to real value, there is little that people value more than homes, suggested fellow panellist Tom Goodall of Related Argent. And the low level of UK housing starts, compared to last, was an acute indication of the state of the nation, as well as being a problem for employment across the board. If projections are right, said Goodall, in three years we’ll be delivering just 100,000 new homes a year, compared with 200,000 now and 300,000 in the government’s target. ‘We need to restart the machine’, said Goodall. ‘That is a huge, huge disparity’. Challenging, indeed. Another member of the panel, Rajesh Agrawal, deputy mayor of London for business, also used the ‘C’ word in relation to the market currently, in the capital. ‘But we are there, standing shoulder to shoulder with your sector’, he said.

Housing is indeed something we value, but is also a sector with deep issues, explored in a session on delivery, chaired by Claire Bennie of



Municipal, who was also behind NLA's recent report on the subject. In so doing she revealed some key facts, such as that PRS tenants spend some 42% of their income on housing, and 40% of those PRS tenants need to take benefits even though they are in work. Or that the average deposit for a first-time buyer is now £125,000. Or, indeed, that 31 million sq. ft of office space was lying empty in London in August 2022. Could some of that be converted?

A likely major contributor to the much-needed pipeline of homes to be delivered for London is Places for London, TFL's newly branded arm that has plans to build 20,000 new homes, with 800 already completed. 'We're building London's newest Great Estate', said chief executive Graeme Craig. 'That's the mindset we must have'.

But the market is such that, even with a change of politics, 'self-help' is now the name of the game, said Robin Dobson of Network Rail. 'The nature of funding has changed', he said. 'it's not going to happen through the public purse any more'. Local authorities needing more homes, such as Enfield Council, are looking for 'pragmatism and adaptability', said Joanne Drew, the authority's director of housing and regeneration, particularly when it comes to financial issues or changes in the regulatory landscape. Such as that governing those secondary staircases, now required in all new residential blocks over 30m, ordered in February by mayor Sadiq Khan.

Social value, of course, is quite rightly moving up the agenda for the built environment professions. And this whole subject was explored in a number of sessions including an engaging discussion called Design matters: exploring good social value, chaired by Savills's director of social value, Wesley Ankrah. We need to move away from the idea that social value is something that costs money, he began. 'It's not. It's something that is actually an investment'. The problem we have



at the moment, though, said Ankrah, is that we are trying to measure everything. 'I think that is where we are in a bit of a rut with social value'. But Yemí Aládérún, head of development at Meridian Water was clear-sighted in her objectives, and of that of the whole sector. 'We want to make sure that social value is not optional', she said. 'It's not a nice-to-have. It's an obligation'. Behind every number is a person, and behind every metric is a person, she went on. Not only that, but social value can and does affect the bottom line, something which should make all in the development community sit up and take notice. 'Happy, healthy people and communities drive value, not only in terms of placemaking, but also financially', Aládérún added.

**'Happy, healthy people and communities drive value, not only in terms of placemaking, but also financially.'**

Yemí Aládérún, Meridian Water

When it comes to the existing built environment do we value what we have enough? Perhaps an LREF session on 'citizens as stakeholders in a circular city' could provide a few answers here. 'We operate in a take, make and waste economy', said Arup's Dr Kate Jackson. Only around 7.5% of materials are reused in the UK, a shockingly low statistic. But then again, that represents a 92.5% opportunity, Jackson reflected, for reusing and recasting materials.

Perhaps one of the answers is to alter the way that this whole area is communicated. 'We've tried to talk more human, about things you buy and things you throw away', said Samantha Nicholson, Manchester Climate Change Partnership, on avoiding using the language of sustainability and circular. It's a difficult climate in which to talk about these things at all, though, with UK PM Rishi Sunak clearly reigning back on green policies, noted Cllr Peter Mason, leader of Ealing Council. 'We've all seen the politics play out in the last week', he said,



referring to the travails of HS2. 'We have to tread carefully; we have seen, time and again, how issues like this have been weaponised.' Maybe it would be better to look to the power of grass-roots, nudge-culture prompts toward widespread behavioural change, rather than grand pronouncements or strictures. 'There are social cues that we can take from each other'.

When it comes to acting green, we have a moral responsibility to do the right thing', suggested Mark Tillett of Heyne Tillett Steel in a session on sustainable construction and retrofit, citing the huge impact that the built environment professions can have on the global picture. New buildings need to look to being adaptable, if a greener future can be grasped. If there was a problem here, Tillett suggested, it was that the industry is still a bit 'box-ticking'. Nevertheless, said Ged Simmonds, MD, Offices, at Mace, organisations have a 'moral duty' to make an impact and 'there are massive, massive inroads that we can make'. There may be no one silver bullet, Simmonds added, but the 'whole industry needs to pull together'.

Finally, and to look to the coming decades as they affect the capital, it was the industry's future leaders that were pulled together for the end presentation, with chair Kat Hanna of Avison Young shepherding their views on a new book, 'London of the future' following a presentation on its scope from London Society's Leanne Tritton. 'One of the biggest issues that we have is explaining to the general public how our world works, and why we go about things the way we do', said Tritton. 'And our aim is to simplify those messages and make it easier for people to understand'. The book aims to do this with a look through various authors at ideas for the capital, which were reviewed by a group of young practitioners. Gardiner & Theobald's Evie Treanor's vision for the future was about equal opportunity for all, and in particular, for London, while other conversation points included thoughts on air quality,



talent, the high street, housing’s impact on productivity, sustainability, community, the importance of mentoring and collaboration. ‘What really inspires me about the Next Gen cohort’, said panel chair Kat Hanna, ‘is that they’re actually already leading. They’re not waiting to be told’.

**‘What really inspires me about the NextGen cohort is that they’re actually already leading. They’re not waiting to be told.’**

Kat Hanna, Avison Young

So, as a leitmotif for this year’s LREF, there are challenges, for sure, all around — and not least given the current economic climate. But with the future in the hands of LREF’s thinkers and do-ers, as well as the next generation of leaders, and perhaps, further off, the Next Next Gen — some of the schoolchildren invited to LREF to witness what development actually means — the value of what emerges will surely be acknowledged, explored, and fully interrogated.

Roll on next year.



# Roundtables

- 20 Retrofit
- 21 Social value: from statements to actions
- 22 Power of partnership
- 23 Housing
- 25 Tall buildings
- 26 Workplace
- 27 Diverse leaders—representation matters: diversifying the industry
- 28 How can local authorities finance the net-zero transition?

# Retrofit

With the climate crisis and the ‘Net Zero’ target for 2030, we urgently need to reduce embodied carbon emissions, and prioritise the conservation of existing buildings, and retrofitting is one of the key ways to achieve this.

This roundtable looked at the incentives that should be implemented to Retrofit first — should we use the carrot or the stick, and how can we encourage a cultural change? Collaboration across the industry is essential, and public and private sectors should and can all play a role.

Key takeaways and viewpoints from the session included that:

- More regulation was perhaps needed to create more sustainable buildings — there is an ‘unhelpful policy vacuum for retrofit’.
- The value of meeting climate change commitments is a driver, but housing quality and affordability brings a new focus to prioritising and finding solutions for retrofit.
- Many architects enjoy the challenge of retrofit, but the education piece is huge. Taking the message to clients in the right way is important.
- Clients need support and knowledge to convince them that retrofit is the right approach.
- There are cases when retrofit is not suitable; when the cost of retrofit is higher than demolition.
- All buildings should report their energy use, etc — they should share that data and knowledge of how to improve the building stock.
- Occupiers play a massive role in the energy usage of a building. Perhaps there should be data sharing regulations.
- If you’re only occupying a buildings 3-4 days as an office, could that building be occupied at other times?
- Retrofit of residential needs more government help, perhaps with debts charged through the power system over 15-20 years

# Social value: from statements to actions

Embedding social value into planning is gaining momentum, but can we translate it into action? For developments to deliver tangible benefits for the communities they serve, we must collectively analyse the data we gather, which metrics we use to analyse this data, and how we then interpret the data. How can we share best practice and resources to achieve shared outcomes?

This roundtable's key takeaways included:

- We need a pan-London standard to set the bar for social value that would mandate certain outcomes.
- However, local authorities need to play a part in how this guidance could be translated into the planning process.
- This could be a 'process' or toolkit, rather than a framework, and be flexible and accessible for different scales of project and SMEs.
- Clients, designers and other consultants need to be upskilled on how to embed social value at every stage.
- Accountability to the local community should be the glue that holds things together.
- Sharing best practice is essential, from both here and abroad.
- New technologies including AI can facilitate the quantifying of 'qualitative' data e.g., resident feedback, and this needs to become a bigger factor in decision-making.
- The term 'social value' is not liked by certain stakeholders
- It must consider 'full lifecycle' — social value often accrues rather later on 'in use'
- It needs to be mandated so that it becomes embedded within the development process and costed for
- There is as much to learn from what didn't go so well e.g. what can we learn from our town centres regenerated in the 1980s and recent initiatives too
- There is a role for local authorities to speak up and share — particularly officers
- The industry can also encourage other forms of quantification e.g. through KPIs.
- Qualitative reporting continues to play an important role — to capture the stories that result.

# Power of partnership

Often, planning and development in London are seen as fragmented, complex and disconnected. But working together in partnership can enable us to unlock new solutions and approaches to shaping places for the future. How do we align and coordinate the public and private sectors towards an inclusive post-carbon London? How can the built environment industry come together under consistent definitions, frameworks and regulations that provide clarity and allow us to take collective responsibility? How can we better communicate the value that a cohesive common-goal-oriented industry can bring to communities?

The roundtable provided some key takeaways and viewpoints that included:

- Residents have stopped trusting councils.
- There needs to be an acknowledgment that procurement is not all about financials.
- The public sector at times needs to think more like a private sector developer.
- Utility companies need to be brought into the net zero conversation as the ‘missing’ partnership.

- True partnership requires you to stop and commit to something written down.
- There is a responsibility to story-tell.
- Could local authorities contribute 5% of budgets to stimulating innovation?
- The ‘team sport’ approach is key.
- Big projects require hope and trust that there will be success.
- People need to be told the truth, even when it hurts.
- The industry can also encourage other forms of quantification e.g. through KPIs.
- Qualitative reporting continues to play an important role — to capture the stories that result.

# Housing

In London there is a fantastic range of housing tenures and products available to the market, from co-living to build-to-rent, to later-living and student-housing. With the ever-increasing cost of living, however, these products only seem to be getting more expensive. With London's housing crisis showing no sign of easing, what value does this wide range of tenures bring to the table?

Wide-ranging takeaways included:

- The best way to make housing more affordable is to put more of it on the market.
- In London at present, the density of proposed housing improves the viability of schemes.
- However, new general-needs housing is a small part of the answer—we need to think about integrating a wider range of housing types to solve the collective problem.
- There was a suggestion to adopt a 'Class E' approach for housing: building houses that could be developed into other things in the future and developing mixed used spaces.
- The cost of land and the planning process were highlighted as two inescapable obstacles for solving the housing crisis.

- Planning processes are now taking twice as long as they were four years ago.
- How we make the planning system more flexible is something that needs to be addressed.
- Planning is expensive and risky and there are no clear targets around sustainability.
- There's no policy about whole life carbon; no one has delivered a housing scheme at scale that reduces embodied and whole life carbon target.
- Neighbouring homeowners are often the loudest objectors during a planning application; we need to find better ways to engage the whole community, to get a balanced response from community consultation.
- The public sector needs to support lower income residents earning too much to get access to social housing, but earning too little to afford to buy or rent in the private sector.



# Tall buildings

Over the last 10 years, the context for tall buildings in London has changed considerably. Sustainability, building safety and policies are all having an impact on the tall building market. So, can they still be a viable option in London? In London, the majority of people live/work in or near a tall building. What is the impact and how do we measure people's perception and experience of tall buildings? And what values can this typology of building can bring to the city and its people?

The Roundtable threw up some interesting takeaways and viewpoints, which included:

- Tall buildings need to be in the right location next to transport big infrastructure, with good active public realm (on the ground floor and rooftops), a long life loose-fit 'chassis' approach to mix uses and be able adapt well into the future.
- Landscape and biodiversity are key considerations to integrating them in the context—height really depends on the context which changes perceptions.

- The return to the office is a big issue for London vis a vis tall buildings, although the City is 85% back to pre-Covid levels, whereas San Francisco is at 25%-50% vacancy, and NY is struggling. Toronto is seeing exponential growth.
- Density is down per office, in the office—fewer people are back.
- Local plans—there is a need to define how tall is tall.
- There is an expected impact of exodus of Canary Wharf heading to the City, 'London needs Canary Wharf to succeed'.
- 'Tall buildings need to work harder'.

# Workplace

With hybrid working becoming the new norm, the question of the future of the workplace is crucial. What is the current market value for office buildings in central London, and can we talk about stranded assets?

This roundtable's key takeaways and viewpoints included:

- The future pattern of in-versus-out of office work is still evolving, making it hard to develop and design for the new 'normal'. Hybrid working/return to the office has yet to settle. Flexibility will be key, in terms of workplace design or future change of use (e.g., offices to hotels).
- The panel felt flexible working was here to stay, but that we are likely to see more returning to the workplace, depending on sector.
- Anecdotal evidence of companies that fitted their offices for hybrid, with collaboration space, sound-proofed booths/seating, AV presentation suites, etc. are converting some of this space back to desks, to meet demand from staff for conventional office work.
- Some boroughs report strong demand for co-working/flexible workspace locally, with people wanting a break from home-working while remaining local.
- There were concerns raised about the 16–24-year-olds entering the world of work but based 100% from home. What are they missing out on in social or career development?
- What future for so-called stranded assets? It might be better to call them 'opportunity assets'. Some can be upgraded and refurbished, but some don't have the 'bones' for contemporary office use. Planning hurdles need to be removed/relaxed to allow conversion.
- People work in offices to enjoy the surrounding culture/amenity/F&B/social life. Securing futures for office assets requires placemaking, both internal and external.
- How do we drive investment into stranded assets, to fund refurbishment or repositioning? Institutional/sovereign investors may need more convincing. London needs to sell itself, collectively. Overseas investors may not know localities or borough names, but they know London.

# Diverse leaders — representation matters: diversifying the industry

How do we create value for the communities we serve? It starts with creating a diverse and representative industry that reflects the people we are planning, designing and developing for. As more people from under-represented backgrounds join the industry, how do we make sure diversity at senior levels is being addressed? What policies, training and initiatives should be in place to aid this? How do we ensure project teams are inclusive across the board?

This roundtable's takeaways included:

- In organisations that have begun to identify and action the need for greater diversity, this is emerging at junior levels; but is much less apparent at senior levels.
- All companies should have expert EDI training including unconscious bias training for the management and HR teams to establish an EI action plan including accommodation, flexibility and positive action.
- Senior level buy-in is required for any EDI initiatives to be meaningfully implemented.
- People with privilege identifying that they have walked through open doors during their career can have an immense impact on those with less privilege — paying forward can change lives.
- Reverse mentoring is invaluable for increasing senior diversity — personal experience shared to people in power encourages understanding. Some call it mutual mentoring.
- Managers should monitor promotion opportunity and award amongst diverse members of their team. Slow career progression leads to poor retention and lack of senior diversity. Consider upskilling.
- To encourage diversity we should allow for cultural and character differences in communications — introverts can make as valuable a contribution as extroverts. Avoid mistaking confidence for competence.
- Demand that your supply chains also act with equity — this has been implemented by the public sector and is beginning to effect change.
- The value of supporting diversity is both social and economic and can be demonstrated in the end product being innovative, inclusive and sustainable.

# How can local authorities finance the net-zero transition?

Over **320 councils** have declared a climate emergency, while **82% of all UK emissions** are within the scope of influence of local authorities, so how can local climate projects be financed? What innovative financing mechanisms exist and what new ones are needed? What do local authorities need to fund the transition to net zero and what do they need from the private sector to support them to decarbonise?

The roundtable included the following takeaways:

- There is a strong desire from public and private sectors to work together to channel more capital into transitioning to net zero in a way that delivers for local communities.
- Local authorities can take the lead increasing consumer awareness of the benefits of energy efficiency upgrades. Through informed campaigns and marketing, local authorities can help to drive demand by leveraging their knowledge of the local area and educating residents on the benefits of retrofitting.
- Local authorities would like to see the private sector and private capital move further up the risk curve and get involved earlier in the development process, through providing technical advice and assistance.
- There is capital available — either through grants, development banks or private capital — but timeframes can often be misaligned and impact on the ability to fund long-term capital programmes. Early on, councils would benefit from support funding feasibility studies.
- Councils use Public Works Loan Board due to ease, but other forms of finance can be cheaper, e.g. those offered by development banks or Local Climate Bonds.
- Public and private sectors would benefit from greater knowledge sharing, especially on successful projects

# Industry insights

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# Transformative cities — decentralised and integrated

by Becci Taylor, Director, Arup



Cities are beset by challenges: physical, social, and political. From inequality, rising poverty and housing supply, to climate change, creaking infrastructure and need for resilience, they are exacerbated by post-truth politics and public sector resource constraints.

However, cities' density, energy and complexity provide a platform for transformative change. The session I chaired at LREF, *UK cities — challenge to opportunity*, demonstrated how how forward-thinking city leadership can catalyse action and deliver broad value locally. Effective development strategies capitalise on each places' unique assets and needs, attracting private investment to bolster vital aspects of physical infrastructure, such as mobility, digital technology, and housing.

Enhancing a city's physical systems returns social value through inclusive economic growth. Public transport improvements support access to jobs and skill development; improved health outcomes elevate both quality of life and productivity; investment in housing supports new community facilities. These systemic benefits highlight the potential of long-term, decentralised funding; freed from silos to enable joined-up programmatic change.

Transformational systems approaches begin to decouple social and economic value from resource use — unlocking lifestyles aligned with net zero and nature positive models. Anything we build now must last and we must retrofit buildings, transport and energy systems at pace and scale to deliver this. We must also sweat these assets through diversity of both types and times of use.

Trust of city citizens is key to success, and engagement must often be hyper local. We embark on a collective journey to success where value encompasses an improved quality of life alongside the positive social and environmental evolution of the city.

# Value of partnerships

by Graeme Craig, Director and CEO, Places for London



At LREF this year, I was proud to announce our new name: Places for London. The brand really encapsulates everything we're trying to do. We're making a promise to deliver green places, accessible places and connected places. Places for every part of London and every kind of Londoner.

We are very conscious of the responsibility that comes with managing Transport for London's landholdings across the capital. Our portfolio spans London and we have a major role to play in providing homes — especially affordable homes — but, as highlighted as part of the Housing Delivery panel session, we can so much more if we work in partnership with others.

By combining our land and skills with Grainger's expertise and experience in the Build to Rent sector, we will build thousands of high-quality, low-carbon homes, including 40% affordable housing.

We have just completed our development at Blackhorse View — our joint housing development with Barratt London and L&Q. It's a car-free, tree-lined development right across from Blackhorse Road Tube station, bringing 350 new homes to the community — 50% of which are affordable — and all of which have been sold, with three-quarters

going to first-time buyers. As with every scheme we deliver, we also focused on transport improvements, in this case including a new public cycle hub.

We are now working with Barratt London at Wembley Park and Bollo Lane. Increasingly we will be working with partners on a multi-site, multi-year basis. That is not just private sector partners. We will also be working with boroughs and public sector organisations. Our collaboration agreement with Network Rail is just the start. At the session, Robin Dobson and I explained that, together, we will not only be building thousands of homes across dozens of sites — such as Stratford — but also bringing forward critical infrastructure that would otherwise not be delivered.

By working jointly with like-minded partners who share our ambitions, we can build the kind of homes that Londoners actually need: sustainable, desirable, and fairly priced.

# Innovation and growth

by James Addison, UK Head of Operations, JLL



Innovation is central to shaping the future of the built environment and addressing both the challenges and opportunities that we face as an industry to drive sustainable growth.

Given that the built environment accounts for 80% of carbon emissions in London, innovative solutions are urgently needed. Advanced technologies will help investors bridge the gap between net zero carbon intention and action; such as using smart building sensors, AI-powered data analysis, and new building practices such as urban mining and algae based air purification.

By exploring ways to adapt and thrive, cities like London can also respond to changing occupier demand, ageing real estate and the emergence of submarkets, which is shifting focus away from a reliance on traditional offices towards multi-purpose destinations that cater to the needs of residents, visitors, businesses, and investors.

Underpinning these environmental and societal considerations is the integration of technology, particularly Artificial Intelligence (AI), which is poised to revolutionise the way buildings are used alongside sustainability and human-centric design considerations. Within the office space the demand and value of integrating technology is clear:

JLL research found that 92% of occupiers believe that commercial real estate technology will provide a competitive advantage for their organisations and 91% expressed a willingness to pay a premium for tech-enabled spaces.

At LREF we discussed how collectively our industry must act to integrate innovative solutions and technology: being purpose-led and clear on the challenges being solved; scaling up ideas and developing appropriate skills; and the importance of collaboration both within and outside of the industry. In this way, we can harness innovation to enhance occupier experiences, drive sustainable growth across portfolios, and use innovation and technology to create a more resilient built environment for future generations.

# Collaboration proves key for enhancing sustainability and productivity in the workplace

by Dan Jestico, Director, Savills Earth



The energy consumed by buildings in operation is under scrutiny like never before. With each unused desk in an office resulting in approximately one tonne of unnecessary carbon emissions every year, it has never been more important to think smarter about how we service our new, hybrid working environments. On top of this, the amount of carbon embedded in our products and supply chains is also coming into question along with the need for a more circular economy.

However, it is not just the environment that needs to be considered when looking at the workplace, people are the heart of every business and the current workplace essentially has two competing needs:

- To provide a modern and flexible environment that is inviting, inspiring and productive for employees
- To reduce turnover and materials waste and ensuring that the resources needed to construct and operate buildings is minimised

So how do you ensure you are responding to both?

According to the panel, part of the solution lies in quality and flexible designs that are adaptable to changing tenant requirements, along with the specification of quality, long lasting products. Innovative ideas also included repurposing of upcycled furniture.

Throughout our discussion, the need for collaboration between landlords and tenants was a constant theme. Whilst both can ensure that their net zero ambitions are the driving force behind fit out specifications, there is a growing need for shared targets and delivery frameworks to ensure the overall success of a scheme or building.

We know that data provides a fundamental insight into how, when and why space is used, but by sharing data, landlords and occupiers immediately increase their vision into how space can be made more sustainable and productive. It is also of course important to take this collaboration beyond data sharing with frequent, qualitative feedback sessions proving equally valuable in the overall process.



# London Real Estate Forum

London Real Estate Forum  
14.00-14.45  
**Transforming productivity and building future skills**  
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London Real Estate Forum

# Transforming productivity and building future skills

by Andrew Jackson, COO for Construction, Mace



Construction is an industry where you can clearly see the fruits of your labour. You can walk down the street and point to the building you've been involved with and say, 'I had a part to play in that.'

Our industry is an exciting one to work in, and we need to collectively convey this message to a wider group of people to help increase the diversity of our sector, so it better reflects the communities we work in. We need to get into schools earlier so that young people hear wonderful examples of what type of career they can have in construction.

The industry faces some unprecedented challenges, from reducing the impact it has on the environment to tackling skill shortages. Ultimately many of these problems can be addressed through greater productivity.

One of the best ways to enhance productivity is through collaborative approaches to procurement and construction delivery. Where supply chain relationships are built on trust. Contractors and the supply chain are engaged early, the allocation of risk in contracts is fair, and the behaviours and culture are right. When all this is in place, you tend to see projects are much more efficient and productive.

We also need to adopt a more efficient way of construction through Modern Methods of Construction — what we call Construction to Production at Mace. By producing more off-site the industry can cut waste, improve programme times, enhance health and safety, reduce carbon and even promote diversity.

# Art and culture: reshaping the public realm for wellbeing

by James Mark, Chief Strategy Officer, Therme Group UK



We humans are social creatures. We created cities to be close together — initially for protection, then for commerce and prosperity, and ultimately for community and shared social experiences. On the flip side, we know they can also be harsh and inequitable places, with key challenges arising such as loneliness, pollution, social and health inequalities to name a few.

Culture is the very essence of being human — it's what we eat, where we live, what we do for work, rest and play, how we learn and who we connect with. Art and culture in our public realm create opportunities for social interaction and community engagement. Art installations, performances and festivals all serve to bring people together, fostering a sense of belonging and community pride, inducing wellbeing and consequentially fuelling our economy.

Post industrial revolution, city 'success' has principally been measured through GDP with an obsessive focus on growth. As we now move into a mindset of circularity, we are consciously acknowledging that growth should not be at any cost. How we measure success and value in our cities and communities therefore also needs to shift to more human and planetary criteria — i.e. a wellbeing economy.

This measure of value is designed to serve people and planet first and not the other way around. We should consider factors such as health and life expectancy, life satisfaction, happiness, safety, social cohesion, cultural diversity, environmental impact. Would we not consider that by focussing on these measures of success, economic prosperity would also follow?

The influence of art and culture in our public realm and built environment unquestionably positively impacts many of the above success criteria and has a profound effect on nurturing all dimensions of wellbeing for people in cities. This is what we need to value for the sake of our future generations.

# London 2123: future leaders' vision

by Evie Treanor, Associate Director, Gardiner & Theobald



The Future Leaders panel discussion at LREF gave an insight into the Next Generation's (NextGen) views on the future of London in 100 years' time. The panellists discussed the 'London of the Future' book and shared their own visions for the future of the metropolis. They pondered what London would feel like, look like, and most importantly, what the experience would be like for those living in it.

The overarching themes of the discussion centred on equipping young people with the skills to succeed and tackle the societal issues which lie ahead. This will be improved in the future by widening the talent pool available to companies, through using technology such as holograms in schools to talk about Apprenticeships schemes and the broad range of career paths which are available in the built environment. The benefits of reverse mentoring were also discussed, and how it can help senior leaders understand and meet the needs of young people working in the sector.

As expected, sustainability was a prominent topic, with a focus on the imperative of achieving net-zero carbon emissions. There was a clear sentiment against 'energy-hungry buildings,' with an emphasis on advocating for sustainable housing solutions.

The discussion also addressed how to prevent the exodus of young people away from the capital to further afield, through prioritising safety, encouraging walking and cycling as alternatives to driving, and making housing more affordable.

The future leaders were determined for London of the future to be greener, safer, and more equitable for all.

Gardiner & Theobald supported the NextGen activity at LREF 2023, championing future leaders to build a better tomorrow.

**[Check out this film to find out more.](#)**



# School Engagement: creating valuable new experiences for young Londoners

by Grace Simmonds, Head of Learning & Engagement, NLA



The School Engagement Programme returned to LREF for 2023 providing a unique opportunity for students to engage with the built environment industry and inspire the next generation of city-makers. Having never visited central London before we welcomed the Year 10 students from Harris Academy Peckham to the Barbican and started their day hearing the inspired and varied career stories of some senior industry professionals.

Louise Duggan, Head of Regeneration, Good Growth at GLA kicked off proceedings with her inspiring career path and shared some case studies she has worked on. Catarina Sampaio Cruz, Associate Director at Benoy told us about her architectural studies and international projects she has designed and Nick Jerrard, Associate Public Health Engineer at Hoare Lea shared his apprenticeship experience in engineering. The students learned that not all career paths have straight forward trajectories, but it all helps to gain experience and knowledge.

The students then took part in an architectural photography workshop led by Luke O'Donovan and Kes-Tchaas Eccleston. Using the LREF theme of 'Value', they considered what they value most in public space and took photographs that represented this. They curated exhibition photo boards adding key words such as: green, accessibility, safety, fun, natural, relaxing and calm, and we hung them in the Barbican





conservatory where each student presented what they value to the whole group. Reflecting on their experience, a student said 'I enjoyed the photography aspect of today's workshop because it let me get creative. I also learnt the different opportunities geography opens up for our futures'.

The students also took part in some 1-1 mentoring with a cross-sector of NextGen built environment professionals, giving them the opportunity to find out more about the industry and the chance to ask about subjects and interests that have helped shape their career to date. One student said 'I liked talking to the different people about their career, it gave me an idea of what I want to be' while another shared 'I am interested in architecture because you will do things for the community'.

We finished the day around NLA's City of London model where the students got a different perspective of the city. We discussed the theme of value again with students remarking 'Value to me means how important something is to me or others or even the environment' and 'don't take the things we have for granted' — something we can all learn from. I returned the students' exhibition boards to the school the following day where they are now being used at an open day and displayed in the corridors of the school to inspire others about the built environment and the things they value most.





# Tours

The Tours Day returned for 2023 on 28 September, with our delegation taking to the streets to explore some of the capital's most exciting developments and new projects. Tours were conducted via Routemaster or on foot.

## **City tour**

The tour encompassed historical treasures like Berlage's Holland House, a breathtaking 50th-floor view at 8 Bishopsgate, and an underground tour of Broadgate campus construction sites, including AHMM's 1 Broadgate and 3XN's 2 Finsbury Avenue. Altogether, it was a fully comprehensive City of London adventure!

## **West End tour**

CDA led a tour of Holborn and Clerkenwell, highlighting key public space improvements like the transformation of Clerkenwell Green from parking to a tree-lined gathering area. We admired the Shaftesbury Theatre's modern renovation and enjoyed lunch at Arcade before exploring the history and design-focused Chancery House Work Space in the Fleet Street Quarter. Our day ended at Peterborough Court's 12th-floor marketing suite, once Goldman Sachs' European HQ, now undergoing high-standard refurbishment.

## **West London tour**

Starting with a delicious breakfast at Reineta in Dickens Yard, the tour progressed through Ealing Broadway, where discussions revolved around recent and upcoming developments. Boarding a Routemaster to Southall, the group delved into the opportunities and challenges of developing placemaking projects in a culturally diverse setting.



### South tour — A

The LREF Tour featured Greystar's ambitious Bermondsey project. Their plans for the neighbourhood are no mean feat! Another standout moment was the visit to Livesey Exchange, where PemPeople's commitment to creating a community space was truly inspiring.

### South tour — B

The day began at Lewisham Shopping Centre, with Lewisham Council and Landsec discussing the retention and redevelopment of the building in consultation with the local community for improved retail and accessibility. In Canada Water Dockside, Art-Invest presented their sustainable mixed-use plan. Lunch followed at British Land's Project Hub. The tour ended at Paper Yard, showcasing a new life sciences quarter with flexible labs built in 9 months.

### North tour

The iconic colourful wrap around Brent Cross Town substation was great — a reminder of green innovation and creativity, to inspire the community and travellers on the M1. BLOQS, in Meridian Water, was a delight: A social enterprise professional makerspace. Efficient, with plenty of space, amazing food and a biomass plant for waste.





# What our partners say



**‘LREF is the foremost annual forum to highlight the Capital’s ability and anxiety to drive significant**

**social value for all communities.’**  
David Williams FRICS, Executive Director, Savills UK Limited



**‘In such a busy world LREF is a great opportunity to lift yourself out of the immediate and reflect**

**with the benefit of a wider purview. It’s also an extremely efficient way to catch up with familiar faces and make new connections.’**

Debbie Jackson, Executive Director of Growth, Planning and Housing, Westminster Council



**‘LREF remains the foremost annual gathering since its inception 10 years ago where the**

**most pressing challenges inhibiting progress or inequality across the built environment are presented and debated. The real estate industry has a significant role to play, and LREF has always achieved the highest quality panellists and contributors to help set the course for change.’**

Simon Hodson,  
Director — Residential & Living Sustainability Lead, JLL — UK Capital Markets



**‘We are delighted to be the Wellbeing Partner for LREF in 2023 in full support of this year’s theme of**

**‘Value’. The wellbeing of people and planet is arguably the most significant factor in how we value the success of our cities, communities and economies. The LREF conference is two days that are well spent to discuss and reflect on the topic of ‘value’ within the built environment sector as we move towards a wellbeing economy.’**

James Mark, Chief Strategy Officer, Therme Group UK



**‘LREF is the essential immersion event, for everyone connected with real estate and development**

**in our capital city — policy makers, designers, developers and investors. LREF provides the forum for important conversations, to enhance London’s built environment and best present its next opportunities. This is where change happens.’**

Robert Evans, Partner and CEO of King’s Cross

# What our delegates say

**‘With the theme of value cutting across the #LREF23 conference this year, it’s been an informative day hearing some of the debates and discussion at the forefront of the real estate sector currently. And of course catching up with clients and other colleagues.’**

Edward Williams, Director at London Communications Agency

**‘Fascinating and provoking discussions on the need for investment in London’s infrastructure, in this case the Bakerloo Line upgrade/extension — described by one of panellist as a ‘no-brainer’ and a ‘bargain’ in terms of benefits.’**

Andy Barron, Associate Director (Infrastructure Planning) Arup

**‘The theme of the conference was ‘Value’ but Social Value was the order of the day, running through almost every presentation I attended. How can we use projects from single buildings to major regeneration schemes to elevate the health and wellbeing of residents, tackle inequality and enhance communities.’**

David Stow, Fire Engineer, Associate Director, Arup

**‘It was great to hear discussion on partnerships and community engagement. I had never before considered that a masterplan might be an alien or even intimidating term — something I’ll reflect on.’**

Martin Reed, Transport Planning Specialist, Central & Inner London

**‘Not often a property panel discussion mentions Taylor Swift, Madonna and Rap Caviar! Great insight into the impact of community, identity, culture and inclusion on the future of the workplace at #LREF23**

Victoria Firth, Co-CEO, Grey Lemon

**‘Really inspired hearing about Make Space for Girls on the platform at London Real Estate Forum.’**

Sam Markey, Ecosystem Director, Place Leadership at Connected Places Catapult

**‘Great day at the London Real Estate Forum 2023. Lovely to see so many faces old and new. Today was perfect reminder that collaboration is key to promoting social value. See you again in 2024!’**

Billy Palmer, MRTPI, Principal Planner at Bidwells

**‘Thank you to #LREF23 and all its contributors for a fascinating day of panel discussions and thought provoking content. The take home message for me was that despite the many headwinds currently being experienced in the industry there are still many opportunities to be had....There are too many highlights to mention here, but the launch of Places for London and the Future Leaders debate were my top two.’**

Jonny Plant, Director, Corstorphine & Wright

**‘It’s music to my ears to hear our industry talking about food as part of our city’s fabric. Fleet Street Quarter ran a pop-up urban farm back in June. Therme Group served tasty lunch showcasing their latest venture in healthy food. Let’s make spaces for food. Let’s improve of the level of resilience and self-sufficiency in our cities, so we cope better with uncertainty in the future’**

First Sukpaiboon, Creative & Design Strategist, Placemaking & Meanwhile

Quotes from LinkedIn and X (Twitter)

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The London Real Estate Forum is run by NLA.

NLA is London's built environment community; a membership organisation for everyone with an interest in London's built environment. Its purpose is to help make London a better place to live, work and visit. Its mission is to engage with professionals, politicians and the public to deliver positive change in the city.

NLA's activities include events, exhibitions, tours, research, publications, learning, websites and social media, awards and competitions, as well as the London Festival of Architecture. NLA's public gallery and event space, the London Centre, is based in the City of London and hosts its London Models.

Learn more at [nla.london](https://nla.london)





Join us in  
September 2024