

An aerial night photograph of a city, likely New York City, showing a large-scale construction project. A massive, dark steel structure, possibly a bridge or a large-scale transit hub, is the central focus, extending diagonally from the top right towards the bottom left. The structure is composed of numerous parallel steel beams. The surrounding city is densely packed with buildings, many of which are illuminated with warm yellow lights, creating a contrast with the dark sky and the steel structure. In the lower right, a construction site is visible with various pieces of machinery and materials. The overall scene captures a moment of intense urban development.

INFRASTRUCTURES

Carter Jonas

ABOUT US

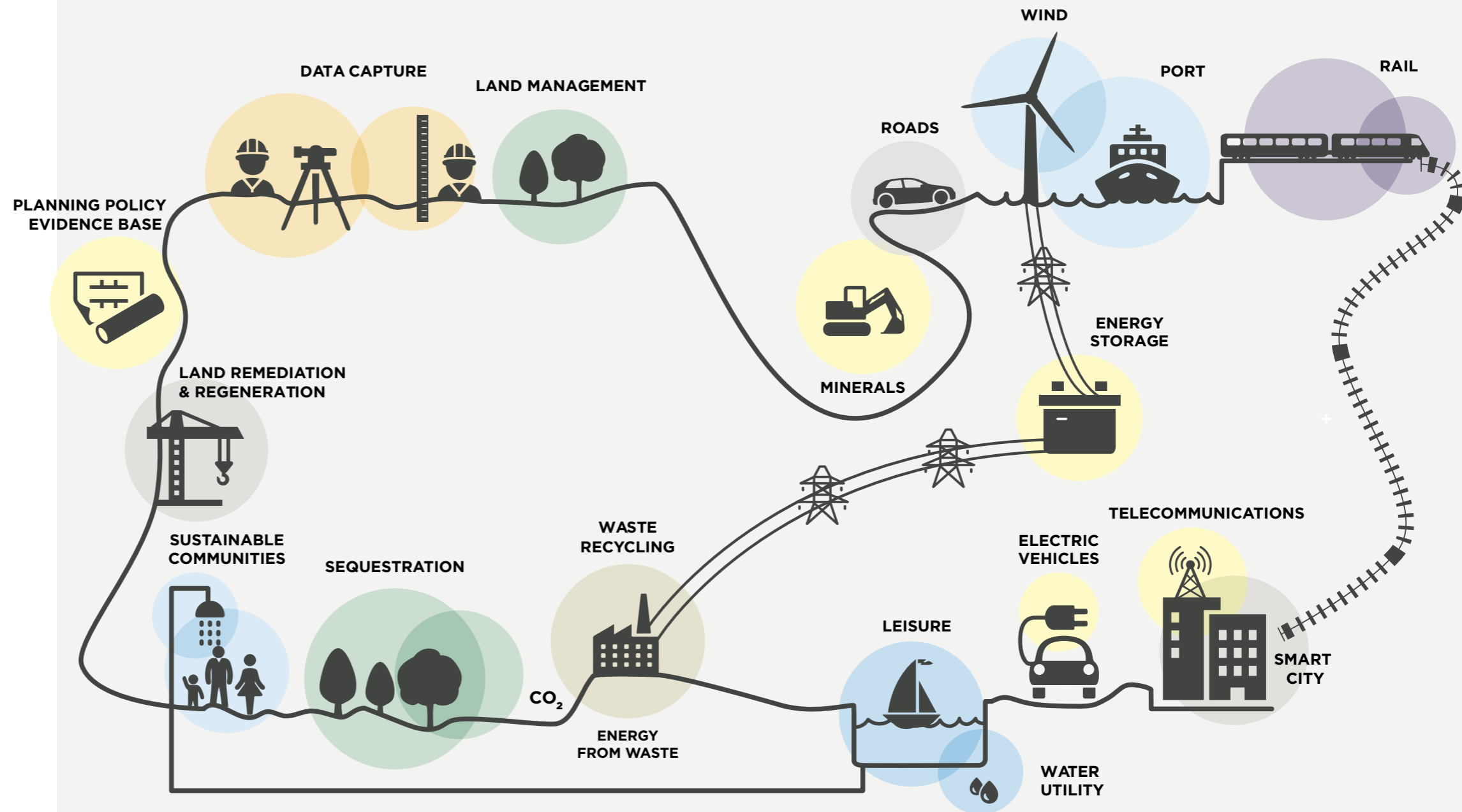
Carter Jonas is a national property consultancy with 800 property experts working across the residential, rural, infrastructures, commercial and planning and development sectors.

Our infrastructure team is the fastest growing of its kind in the country.

In the last decade, we have expanded from a team of four to over 130 and we aim to continue to grow and to achieve our mission to be the leading provider of property expertise for the development, management and trading of assets arising from the infrastructure sector.



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**OUR
 INFRASTRUCTURE
 TEAM IS THE FASTEST
 GROWING OF ITS KIND
 IN THE COUNTRY**

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SECTORS

ENERGY

Our market leading energy team comprises surveyors, valuers, environmental specialists, project managers and town planners.

This blend of expertise enables us to provide sound independent advice on all aspects of an energy project, enabling our clients to take full advantage of the opportunities that the energy market presents.

We provide advice across all forms of energy including:

- Anaerobic Digestion
- Battery Energy Storage
- Biomass
- Combined Heat & Power
- Demand Response
- Electric Vehicle Charging
- Energy from Waste
- Hydropower
- Onshore Oil & Gas
- Solar
- Wind
- Zero Carbon

The team has successfully advised on in excess of 1,000 energy projects, on rural, commercial and industrial land and properties.



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CASE STUDY

PEEL NRE LIMITED - VALUATION OF PROPERTY ASSETS

Carter Jonas' specialist Minerals & Waste Management team is retained to undertake annual valuations of Peel NRE Limited's property portfolio for internal accounting purposes.

All valuations are prepared and reported in compliance with the RICS' "Red Book."

The portfolio of over 40 properties includes quarries, waste management infrastructure and energy generating facilities, including 'Peaking Plants.'

The valuation exercise also includes the 65-hectare Protos site, a multi-modal Resource Recovery Park in Cheshire with plots developed for energy from waste, biomass power generation and plastics recycling.

MINERALS & WASTE MANAGEMENT

Our specialist team of Chartered Surveyors and Chartered Planners is recognised as a leading provider of estate management, valuation and development advice for minerals properties and waste management infrastructure.

The team advises landowners, operators, financial institutions and infrastructure providers throughout the UK and has considerable experience of projects involving aggregates, industrial and energy minerals, construction materials manufacturing plants and all types of waste management facilities.

Our minerals & waste management services include:

- Strategic planning, site search & promotion
- Mineral Resource Assessments & Viability Appraisals
- Advice on minerals ownership, severance & working rights
- Agency - property acquisition, disposals, leases, easements & wayleaves
- Property management - surveys, land terriers & lease administration, including rent & royalty reviews
- Planning applications, appeals and EIAs
- Valuations for all minerals, waste management & ancillary properties

We currently have **>40 MILLION TONNES** of aggregates subject to active infrastructure CPO cases

- Advice on the compulsory acquisition of minerals & waste management assets, the Mining Code & assessments of compensation
- Business rates consultancy
- Expert Witness and Dispute Resolution services

Working with colleagues from the wider firm, we provide a full suite of services across the life cycle of minerals & waste management property, including rural land management, geomatics, telecoms & energy advice, plus masterplanning & development expertise to release latent value at surplus sites.



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CASE STUDY

SLATTERS HOTEL REDEVELOPMENT CPO ST MARGARET'S STREET, CANTERBURY

Carter Jonas advised Canterbury City Council throughout the compulsory purchase process to deliver development on a long dilapidated site in the historic City Centre.

The Council had resolved a number of title issues and secured a developer for the former Slatters Hotel site which had lain dormant and decaying

for over a decade. However, to deliver the development, a strip of neighbouring land and clarification of rights over an adjacent service yard was required.

Carter Jonas was appointed when negotiations broke down and the Council decided a CPO was the only way forward. We advised throughout the process, ensuring a robust case was established and evidenced and that Government guidance was followed from the outset. We recommended additional specialists to present evidence at the inquiry, as well as providing

expert witness evidence. We also worked closely with the developer and the Council's legal team. All objections were withdrawn by the end of the inquiry and the Council was able to self-confirm the CPO, saving several months on the programme.

Our client said "Thank you for all your hard work, and for marshalling a disparate group of people into a unified body working with focus, driving us to achieve what needed to be done. The end is now in sight, and the development can progress unhindered."

REGENERATION

Regeneration, the renewal and revitalisation of the urban landscape, is an essential part of improving the economic, social and environmental wellbeing of our towns and cities.

Carter Jonas is at the centre of regeneration, transforming centres, places and sites. Our dedicated and highly regarded consultancy team has a strong track record of working in partnership with local planning authorities, regeneration bodies, landowners, businesses, investors, developers, stakeholders and communities to help unlock the investment and development potential of centres, assets and sites.

Our energy and purpose as a team is to help our clients create high quality sustainable places and deliver transformational mixed-use regeneration projects that are economically and commercially viable, and valued by all.

Our infrastructure experts work alongside teams from around the business, particularly our planning and development team. Our specialists are able to provide a complete service to local authorities and developers seeking to undertake regeneration schemes.

This comprehensive and joined-up service sets us apart from our competitors and enables us to deliver throughout the lifetime of a project.

Our combined teams can carry out viability studies, developer procurement and partnership agreements and masterplanning.



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TELECOMMUNICATIONS

Telecoms apparatus and rights exists on, under or over land which will generally have another primary purpose: agricultural, commercial, residential, owner-occupier, institutional or investment.

Cross-discipline collaboration within Carter Jonas gives us unique access to advice which reflects the primary purpose of the land or the client's aspirations.

We offer pragmatic, holistic, expert advice.

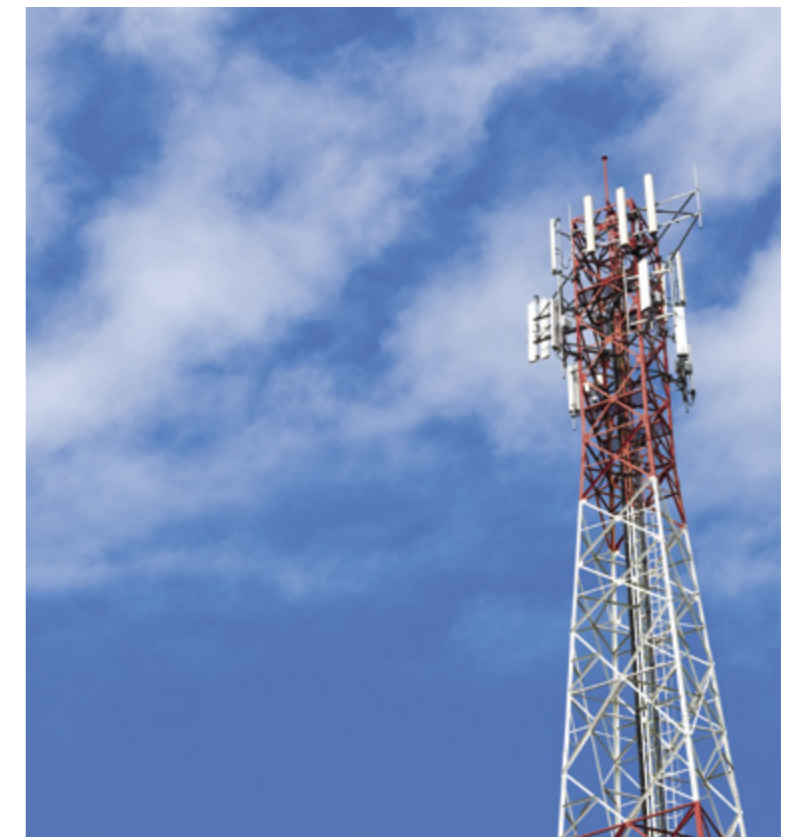
Our team offers the following Telecoms specific services:

- Negotiation of renewal and new site agreements
- Rent review
- Lease and equipment audit
- Apparatus removal or relocation for redevelopment
- Alternative Dispute Resolution (mediation, arbitration, expert determination)
- Expert witness
- Strategic advice
- Policy advisory (5G and small cells)
- Regulator (Ofcom) representations



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“CROSS-DISCIPLINE COLLABORATION GIVES US UNIQUE ACCESS TO ADVICE WHICH REFLECTS THE PRIMARY PURPOSE OF THE LAND OR THE CLIENT'S ASPIRATIONS.”



TRANSPORT

Carter Jonas has been a trusted property advisor to the transport sector for over 15 years and our innovative approach and experience working on large-scale schemes for clients such as Network Rail, HS2 and Highways England has enabled us to grow and invest in a core specialist team of transport experts.

Our team works with colleagues from around the business to deliver a multi-disciplinary range of services to the transport sector – we are able to advise our clients throughout the lifecycle of their transport infrastructure projects and take a holistic approach to such projects, considering them in their regional or national context, in order to provide robust, strategic advice.

We have experience in all enabling powers through which major transport infrastructure schemes are normally promoted – Hybrid Bills, Transport and Works Act Orders, Highways Act or Development Consent Orders. From sponsorship, through public engagement, consenting, land assembly, compensation, to project management, we provide strategic and practical advice from inception right through to project completion.

We operate across a wide range of transport infrastructure projects including:

- Heavy rail projects
- Light rail, tram and guided bus projects
- Motorways, trunk roads and strategic road projects
- Port and airport development and expansion



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CASE STUDY

ESTATES MANAGEMENT FOR SEVERN TRENT WATER

Carter Jonas service provision for Severn Trent Water includes specialist management advice in respect of their rural and telecoms property portfolio. The rural portfolio alone comprises circa 250 let properties, over an estimated 3,500 acres stretching from the Humber Estuary in the north to the Bristol Channel in the south, and from Wales in the west to Lincolnshire in the east.

The rural and operational sites include a number of notable landmarks like Ladybower Reservoir in the north as well as one of the largest treatment plants in the country at Minworth.

UTILITIES

Our team of 80 surveyors includes 10 utility specialists with over 60 years' combined experience working in utility companies. This is backed up by the wider infrastructure team, which is resourced with experienced professionals and technical staff who specialise in the utilities and infrastructure sectors.

We are therefore well placed to provide expert advice on:

- All utility legislation
- Estate management
- Land access for capital projects
- Compensation assessment and negotiation
- Valuation for land acquisition and compensation
- Expert witness
- Program and project management
- Land referencing
- Code of Practice Promotion

- Customer and stakeholder engagement
- Wayleave and easement negotiation

Our utility clients often have property interests that have another primary purpose. With access to all Carter Jonas divisions, we are able to offer wider property advice relating to estates management, acquisitions and disposals, planning and development, minerals and waste management, telecommunications and leisure business advice.

This means that we are best placed to help our utility clients with any property matters.



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SERVICES

AGENCY & INVESTMENT

Over the last 30 years, we have built up a strong market knowledge and understanding of both the active investors and the value of sites, projects and assets being developed across the various sectors.

We have significant experience of applying this market knowledge in promoting and marketing both development sites and operational assets in order to maximise the value for our clients.

Our team has worked on projects across England, Scotland, Wales and Northern Ireland, and has provided expert advice and guidance to landowners, developers, investors and funders on the disposal of various infrastructure sites, portfolios and assets.

Our expertise covers:

- Identification of development opportunities
- Initial marketing advice & research
- Development appraisals and market feasibility studies
- Promoting and marketing projects utilising a secure data room
- Options, joint ventures & development agreements
- Managing the whole sale process



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COMPULSORY PURCHASE COMPENSATION

Compulsory purchase of land and property and the associated compensation is complex and frequently contentious. The valuation and successful resolution of claims requires both technical expertise and commercial acumen.

Our teams provide a nationwide service for both acquiring authorities and claimants needing specialist compensation advice and support across the life of a compulsory purchase scheme. Our services to acquiring authorities are laid out on page 17, in our Land Assembly & CPO section.

For those affected by compulsory purchase, the process is typically drawn out, uncertain and frequently life changing. The claimant is not helpless however, and proactive measures can be taken to protect your position.

Acquiring authorities will always be supported by teams of specialist professionals, and claimants need to be equally well-advised. The best results are achieved when claimants are supported by capable and experienced professionals, with a comprehensive understanding of the legal technicalities, and clear-headed decision making

Carter Jonas provides advice and guidance to claimants with the primary aim of protecting their interests during the compulsory

purchase consenting process and getting full and true value from the compensation system. We offer both technical expertise on the complex laws and procedures and the pragmatic decision making which comes from experience.



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THE VALUATION AND SUCCESSFUL RESOLUTION OF CLAIMS REQUIRES BOTH TECHNICAL EXPERTISE AND COMMERCIAL ACUMEN.

CASE STUDY

NORTHERN POWERHOUSE RAIL

Northern Powerhouse Rail (NPR) is a major rail programme designed to unlock the economic potential of the North. It will be the region's single biggest transport investment since the Industrial Revolution.

We were instructed to rapidly identify interests affected by over 120 route options and present a dynamic Property Cost Estimate to support selection of a preferred route.

Using an integrated land referencing database and valuations terrier saved hundreds of hours and afforded tremendous flexibility during the optioneering process. Parcels that formed part of multiple options received multiple valuations and those valuations could be changed as engineering detail developed. Our Web GIS dashboard presented the figures for compensation by property type and route option, even giving the ability to dynamically revalue by adjusting the buffer width. The database can stay with the project and evolve through all future design reviews and the land assembly process.



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LAND REFERENCING AND CASE MANAGEMENT

Carter Jonas understands that consent for infrastructure development from the population is established over generations. This is why we employ land referencing case managers who understand the complete cycle and are experienced at dealing with people and not just data.

That doesn't mean that we don't get data, our Property & Land Acquisition Cost Estimate (PLACE) software is based on market leading GIS tools. The software is employed on the UK's two biggest linear infrastructure projects for optioneering and acquisition case management. The software is adaptable for individual clients by our in-house developers and deployable on client's desktops without IT roadblocks.

Our expertise includes:

- Identifying affected parties
- CPO deliverables for a range of powers
- Tracking undertakings and assurances
- Property Cost Estimate support
- GIS development
- Dashboards for asset and project management

MEASURED SURVEYS AND MONITORING

Our measured survey capability supports all scales of project, from strategic development land over hundreds of hectares to the smallest topographic, measured buildings and utilities surveys.

We pride ourselves on being at the forefront of technology and can offer innovative data collection techniques such as mobile mapping for rapid data collection, the use of UAVs for mapping and inspection works, and sub-surface detection for surveying underground utilities. This includes custom mobile data collection applications that allow for quick and easy site surveys or property inspections to be carried out with data automatically uploaded to centralised databases.

Consent for building in our highly constrained landscape relies on establishing accurate boundaries and tracking the impact of projects on the surrounding environment. We are experienced at making detailed, measured records of condition and tracking structural deformation, noise and dust pollution that may affect claims against the developer.



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IN THE LAST YEAR, WE HAVE REFERENCED 116M SQ M (28,664 ACRES)

PLANNING & DEVELOPMENT CONSENTING

Our consenting team can help deliver all necessary consents for infrastructure schemes that allow these essential projects to be delivered.

Our development consenting experience has been developed over many years of experience with a variety of different utility and infrastructure providers. The advice of our team is actively sought by our clients to develop robust consenting strategies and approaches for project promotion to ensure that the consents needed are

delivered in a timely, cost efficient way. We can tailor our approach to the requirement of each project and are experts in mitigating risks.

Our team are experts in managing stakeholders and their respective expectations through the challenges that each project brings, right from project inception through the project completion. Under the supervision of our project managers we will take responsibility for the delivery of a scheme and offer a bespoke service based upon the following key activities:

- Providing consenting strategy
- Strategic optioneering

- Stakeholder management
- Liaison with public bodies and statutory stakeholders
- Community consultation
- Hearing/inquiry management and Expert Witness provision
- Coordinating and managing project teams



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CASE STUDY

A47 HIGHWAY SCHEMES

Carter Jonas partnered with the design team, Sweco, to provide DCO management activities for four DCOs across the A47 in the East of England. Scope of works included:

- Management of the application checklist
- Programme management of DCO deliverables including production of numerous DCO submission documents
- Providing expert advice and guidance to all four DCO project teams

In addition to this, Carter Jonas provided full land referencing services, including the production of a Book of Reference and land plans across the four projects.

WAYLEAVES & EASEMENTS

Utilities (overhead electricity lines and pylons, substations, underground electricity cables, and gas, sewerage and water pipes) are essential infrastructure for new development sites.

We act for both utility companies and energy developers looking to acquire rights in order to facilitate their projects, and property owners and developers seeking compensation or diversions for existing apparatus.

On behalf of developers and utility companies, we assist with everything from initial feasibility and route selection, land referencing and landowner consultation, through to securing the necessary land rights.

Diversions & Compensation

Working closely with our rural, residential and commercial development clients and landowners, we review existing rights and determine the feasibility of diverting the utility apparatus to free up valuable development land.

We assess the loss created by its presence and may invoke statutory processes, enabling diversion or compensation if it remains in situ.

Our specialist team also regularly acts on behalf of landowners and occupiers who are affected by utility apparatus, negotiating licences, and wayleave and easement terms with developers.

With UK-wide coverage and over 15 years' experience in this niche area, we are well placed to understand the nuances, including the methodologies adopted by the utility companies, the financial loss created, and the statutory processes involved.

>5KM OF DIVERSIONS AND >£20M IN COMPENSATION ACHIEVED



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ASSET MANAGEMENT

Our infrastructure clients often have diverse property holdings. Carter Jonas is an experienced multi discipline practice with experts in the commercial, rural, planning, development and residential sectors.

We draw on this expertise to provide a complete asset and mixed portfolio management service, including:

- Rent collection and arrears management
- Rent reviews and renewals
- Vacant property management
- Lettings
- Acquisitions

- Disposals
- Maintenance works
- Capital value improvement works
- Project management
- Building surveying
- Tree management
- Unlawful occupation



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ENERGY BROKERAGE

We offer a comprehensive, independent energy brokerage service, working closely with clients of all sizes to manage the risks associated with a volatile energy market.

Our specialist team has extensive experience negotiating both import contracts and Power Purchase Agreements for renewable generators and has built up a nationwide portfolio of clients.

As an energy broker, we work with all the major UK energy suppliers to negotiate gas and electricity purchasing on behalf of our clients. The tender process allows us to analyse markets and secure the most competitive rates, at the optimum time.

If you have renewable generation on site, we also broker Power Purchase Agreements to ensure you receive the maximum return from your investment. Clients span from a private landowner with a 14kW system to multi-MW portfolios, all of which are provided with a bespoke energy management service.



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LAND ASSEMBLY & CPO

Our team of expert land referencers identify parties whose land and rights might be affected by the new scheme, and our land assembly team will begin the process of acquiring the necessary land and rights by negotiation with the land or property owner.

We have an excellent track record of success in doing so, without having to resort to using compulsory purchase powers.

When this is not possible, our Compulsory Purchase Order (CPO) experts are able to advise from an early stage on building a robust case for compulsory purchase as a back stop to negotiations, providing budget estimates of compensation liability, negotiating immediate or deferred acquisitions, and advising throughout the process of gaining and using powers.

Carter Jonas has one of the few specialist land assembly and compulsory purchase teams in the UK who advise across all market sectors. We

have experience and expertise throughout the compulsory purchase process, from laying the groundwork in policy support to settling compensation claims after confirmation of the CPO.



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CASE STUDY

PECKHAM RYE GATEWAY - LONDON BOROUGH OF SOUTHWARK

Carter Jonas has provided strategic CPO, valuation and acquisition advice to the Council since 2014, including the use of CPO powers under the Town and Country Planning Act 1990. The scheme is regenerating a neglected area of Peckham directly outside the Grade II Listed station building and facing Rye Lane.

The development will provide a new square, public realm and new retail and leisure units to support the continued growth of this vibrant part of South London. Carter Jonas led on landowner negotiations and acquired a number of key interests early on in the process. This had the impact of reducing the number of objections to the scheme and the Public Inquiry concluded in two days. Carter Jonas is retained to support the implementation of CPO powers, including the use of GVD notices and will deal with any compensation claims.

WE HAVE WORKED OR ARE WORKING ON OVER 50 NATIONALLY SIGNIFICANT INFRASTRUCTURE PROJECTS UNDER THE PLANNING ACT 2008

VALUATION & DUE DILIGENCE

Our vast experience of valuing residential, agricultural and commercial property is complemented with specialist skills in valuing telecommunication, utility, energy, transport, mineral and waste management assets and portfolios.

Carter Jonas is a national firm and, as such, is able to provide both local and specialist valuation solutions.

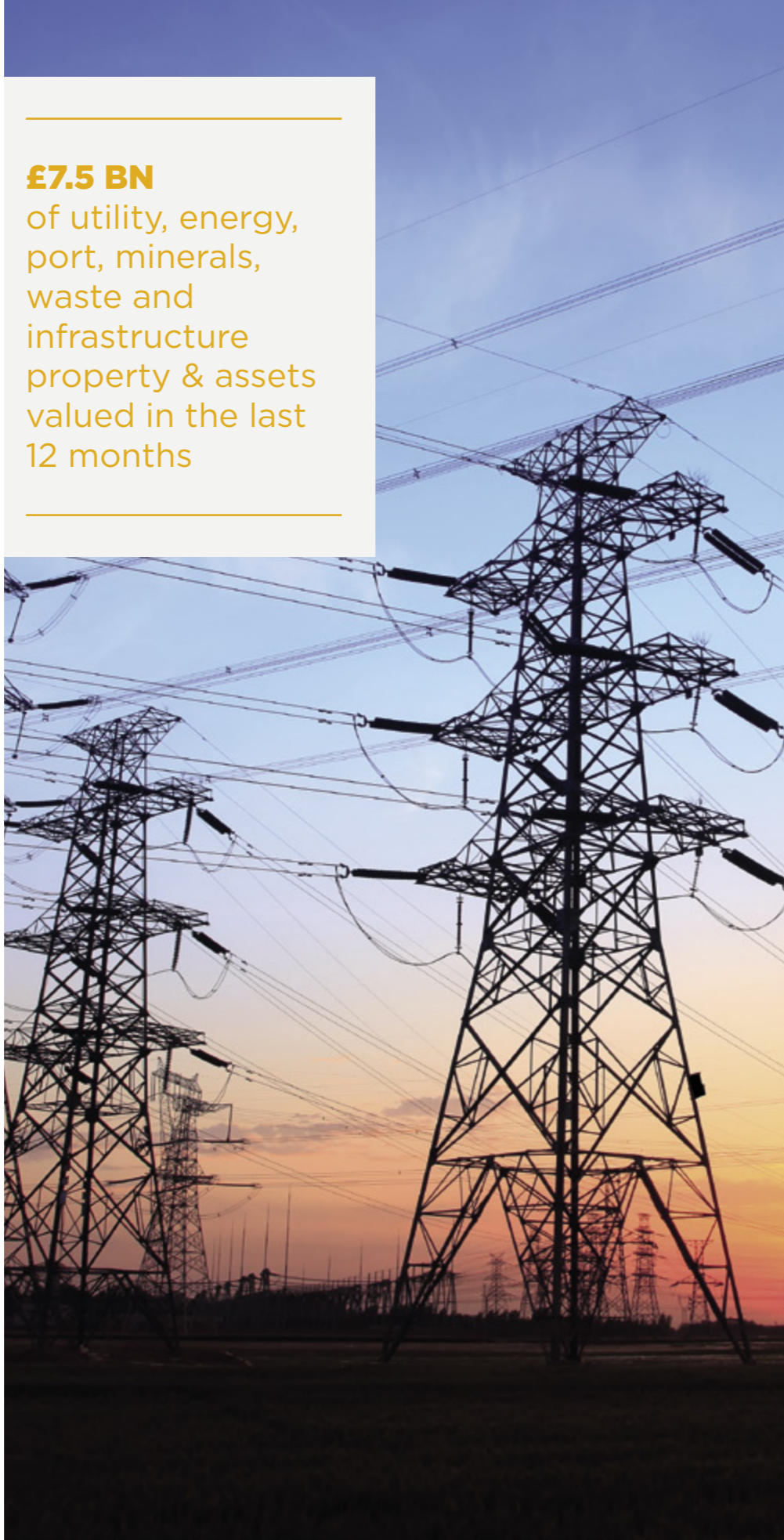
Our experience spans valuations for loan security and accounting purposes to valuations for taxation and compensation. Valuations are prepared by skilled, RICS regulated surveyors who are active in their local or specialist market and able to collaborate on multi-faceted single or portfolio instructions.

We also carry out due diligence for lending and investment purposes.



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£7.5 BN
of utility, energy,
port, minerals,
waste and
infrastructure
property & assets
valued in the last
12 months



OVER 1,000 POINTS OF CONNECTION FOR ENERGY GENERATION PROJECTS REVIEWED IN THE LAST TWO YEARS

GRID CONSULTANCY

Whether you are looking to secure a new grid connection or vary an existing connection for an energy development, our specialist energy team can advise, ensuring that you maximise your site's potential and secure the right grid connection for your development at the best cost possible.

The availability and viability of a grid connection can often be the main driver in determining the feasibility of a new development and so establishing the potential for a connection and reviewing your options is crucial at the outset. Our energy team can guide you through each phase of the process from site screening and options appraisal, preparing and submitting grid connection applications, securing the necessary land rights, negotiating private

wire agreements, through to procuring contractors and project managing connections.

The increased competition for grid capacity along with challenging network constraints means that properly appraising your options and securing a grid connection for your site as soon as possible is more crucial than ever before.

Our services include:

- Site screening and options appraisals
- Distribution and Transmission Network Operator, Independent Connection Provider and iDNO consultation
- Submission of budget estimate and formal grid connection applications
- Advice on flexible and constrained connections, behind the meter, private wire and multi-technology developments

- Land assembly for grid infrastructure and cabling routes
- Capitalising value from grid connection infrastructure
- Negotiating private wire agreements
- Grid contractor procurement and project management
- Connection agreement brokerage



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33 OFFICES ACROSS THE COUNTRY, INCLUDING 8 INFRASTRUCTURE HUBS

Birmingham

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Cambridge

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Cardiff

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Leeds

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London

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Winchester

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SERVICES

Agency and Investment
Compulsory Purchase Compensation
Land Referencing and Case Management
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SECTORS

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**FIND OUT MORE ABOUT THE
CARTER JONAS INFRASTRUCTURE TEAM**

carterjonas.co.uk/infrastructure

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Carter Jonas