

**MONTAGU EVANS
EXISTS TO...
CREATE INSPIRING
PLACES TO LIVE,
WORK, COMMUNICATE
AND CONNECT.**



WHO ARE WE?

MONTAGU EVANS IS AN **INDEPENDENT PROPERTY CONSULTANCY**, OWNED AND RUN BY A GROUP OF PARTNERS THAT ARE **LEADERS** IN THEIR RESPECTIVE FIELDS AND WHO ARE **COMMITTED** TO LEAVING A **LEGACY** OF QUALITY WORK THAT **BENEFITS** CLIENTS, THE BUILT ENVIRONMENT AND SOCIETY AS A WHOLE.

At our firm, the owners of the business do the work, meet the clients and have the freedom to assemble their own teams to suit each unique requirement. This highly flexible and collaborative approach, tailoring the talent to the complexity of the work, has enabled us to develop a business that has spanned nearly a century.

Our work encompasses advisory, commercial & agency, property management and planning, historic environment & townscape services. Together we create inspiring places to live, work, communicate and connect. We care about legacy, partnerships and people. Advising clients with complex planning and development challenges.



WHAT DO WE DO?

We operate as a community of individuals and teach a skilled multi-disciplinary, sector-led and collaborative way of working.

This approach ensures each project receives the commercial and sustainable advice our clients are looking for.

MONTAGU EVANS...

**CELEBRATED
CENTENNIAL
IN 2021**

**450 EMPLOYEES
ACROSS 4
OFFICES IN
THE UK**

**UNIQUE
PARTNERSHIP
STRUCTURE
100+ PARTNERS**

**ANNUAL
TURNOVER
£60M+**

OUR ETHOS..

UNDERSTANDING OUR DNA

BE HONEST

We encourage an honest and straightforward approach to our work and relationships; getting better results by thinking together.

BE YOURSELF

As a Partnership we embrace individuality, we have to! Having so many owners in a business means we need to work together, communicate and agree under a range of circumstances. Diversity of thought is essential to success. By sharing knowledge, learning and ideas, we work as one firm. Always looking to open opportunities for our clients. Never accepting the status quo.

BE CREATIVE

To give our people every opportunity to be the best version of themselves we structure teams through sectors, surrounding individuals with a diverse range of experts with common deep industry knowledge. This ensures clients receive rounded commercial advice at all times and our collaborative approach means, as a firm, our projects are exposed to all facets for successful delivery. Our track record in aligning public and private sector priorities gives us a unique creative view to solving problems.

BE A PARTNERSHIP

Our partnership is built on the trust and the support of our people – that's why, at 100 years young, we continue to thrive and attract the best talent in the industry. We recognise that our people are the heart of our success. Only by identifying, supporting and promoting them will we be able to provide continued outstanding client service.

OUR SERVICES...

PLANNING & HISTORIC ENVIRONMENT

Our commercial planning, historic environment and townscape team draw its success from some of the brightest talents in the industry. The team's experience spans a mix of complex public and private sector projects across a range of uses, combining housing, regeneration, repurposing, and health and commercial advice in one place.

Our skilled experts dedicate their time to building an in-depth knowledge of the political landscape, the local communities they work in, the existing and emerging policies impacting development opportunities and their relationships with decision-makers and other stakeholders. They enable change and ensure the successful delivery of schemes throughout the UK.

Our 20+ strong in-house heritage team advise on all aspects of cultural heritage, townscape and design-related matters, including adding commercial value within the historic environment.

[MEET OUR PLANNING & HISTORIC ENVIRONMENT TEAM>>>](#)

ADVISORY

Our advisory experts are at the heart of planning and development strategies and use their expertise to extract and unlock value for our clients to help them achieve and exceed their objectives.

With experience across the private and public sectors, we represent developers, investors, and landowners together with a range of public bodies, giving our teams unique exposure and an ability to draw upon our vast range of skills and expertise, with a particular skill in bringing the public and private sector together.

We work to interpret policy to maximise benefits for our clients, counsel them to achieve their goals, and support critical thinking to improve the performance of assets, simplify complex problems and create solutions.

OUR ADVISORY DEPARTMENT IS MADE UP OF 6 TEAMS WHICH COVER:

Asset and Investment Advisory: advise owners on asset management and repurposing.

Strategic Advisory: advice to the public and private sector on delivering their medium to long-term objectives through the lifecycle of a development project.

Rating Advisory: minimising the costs of re-development for landowners and developers through a targeted rating strategy.

Development Advisory: helping progress the transformation, development and regeneration of major urban mixed-use projects.

Residential Valuation Advisory: supporting developers value land be that for viability, acquisition, disposal of land, development and operational assets.

Valuation Advisory: providing clear valuation advice across public and private property portfolios.

[MEET OUR ADVISORY TEAM>>>](#)

COMMERICAL & AGENCY

Combining experts from lease advisory, consultancy, investment and agency in both the landowner/ landlord and occupier space, we operate a collaborative, sector-focused commercial and transactional team with a 'consult to transact' ethos.

Our Industrial and Logistics, Retail and Leisure, Offices and Living teams advise, acquire and sell with a collective view to ensure we can deliver a strong return and provide robust advice under a range of scenarios or performing sectors.

IN EACH OF OUR COMMERCIAL AND AGENCY TEAMS, WE OFFER SECTOR-FOCUSED EXPERTISE IN FOUR KEY SERVICES:

Agency: Our leasing and agency teams provide input into marketing and targeting pre-lets to help reduce your letting risk. They offer unique insight into both the occupier and landlord markets across their specialist sectors to assist in the transaction of assets.

Investment: Our investment team's knowledge of local markets and their close network of advisers enables us to successfully purchase or sell properties that meet our client's tightly defined criteria.

Lease Advisory: Our lease advisory teams provide detailed technical knowledge, expert witness support if needed, and market insight in undertaking rent reviews, lease renewals, and lease restructures to ensure optimum returns and savings for landlords and occupiers.

Development: Integrated into our commercial teams are development specialists who look at all alternative use options to underwrite each asset's value and maximise returns.

PROPERTY MANAGEMENT

Our Property Management experts are strategic thinkers who extract knowledge and insight from across the partnership and deliver it to our clients. With a primary focus on the Retail & Leisure and Offices sectors, they support our clients, from identifying market trends to potential leasing opportunities, from new, innovative ways of implementing sustainable and technological interventions to improving the running of the building.

Our Property Management team take a "one firm" approach with our clients, working with experts from across the firm to drive efficiency and innovation and create destinations that support societal, political and economic demands.

Working with private sector landlords as well as public sector government and local authorities, we ensure our buildings systems and operations are run by experienced management surveyors, whose risk mitigation plans are supported through active onsite management, robust compliance, and rent and service charges support. Dynamic business intelligence and our regular, in-depth reports are delivered and supported by our UK-based accounts department.

We also work with clients to enhance customer experience, benefitting occupiers, visitors and the local community. Our Destination team is backed by design experts and leaders in facilities management who drive clear health, safety, and sustainability initiatives using appropriate technology solutions to enable a data-driven service offer.

OUR SECTOR EXPERIENCE...

WE PRIDE OURSELVES IN OUR
SECTOR APPROACH WHICH
ALLOWS US TO COMBINE
INDUSTRY KNOWLEDGE FROM
ACROSS THE COMPANY TO
PROVIDE PRAGMATIC AND
COMPLETELY TAILORED
ADVICE TO CLIENTS.

SCROLL DOWN TO SEE HOW...

GOVERNMENT DELIVERING LONG-TERM SOLUTIONS.

Government is looking to transform the way it uses land and property, moving away from short-term opportunistic realisation of savings to a more considered, proactive longer-term value for money approach.

In this context, property is increasingly being seen as one of the key enablers to delivering the government's wider objectives of improving efficiency, delivering the best possible public services, releasing surplus land for buildings and boosting growth across the UK.

As a firm, Montagu Evans is the leading adviser to Central & Local Government. We provide tailored solutions from single building advice to complex multi-service UK-wide portfolios to support those wider objectives.



DEFENCE INFRASTRUCTURE ORGANISATION PLANNING AND DISPOSAL STRATEGY

DEFENCE INFRASTRUCTURE ORGANISATION

Appointed to the Department of Infrastructure (DIO) to advise on the preparation of a review of the site's opportunities and constraints.

Montagu Evans provided planning and disposal advice to maintain the heritage assets and incorporate them into a residential-led scheme, providing the DIO with capital receipts and contribution to its strategic objective to generate more housing from its surplus land.

The team completed preparation of a site feasibility report and development brief following liaison and agreement with Medway Council and English Heritage.

Montagu Evans secured hybrid planning consent for the site consisting of outline planning, full planning, listed building and conservation area consent for up to 267 units and conversion of the listed buildings.



CUSTOM HOUSE GATEWAY COMMUNITY-LED ESTATE REGENERATION

LONDON BOROUGH OF NEWHAM

Montagu Evans are working closely with Newham Council, community stakeholder groups and a range of consultants to deliver a viable masterplan, site assembly and delivery strategy for this 900 home (first phase) estate regeneration project next to Custom House station.

In what we consider to be the first of its kind, the team is "co-producing" the viability and delivery advice with established community groups, whilst the Council and community are likely to take a significant stake in the delivery of the development. Montagu Evans are also retained to project manage the OJEU-compliant procurement process in the next stage of work.

HEALTHCARE... BUILDING HEALTHY, HAPPY PLACES.

The healthcare economy is notoriously complex, diverse and fast growing. The longstanding trend of rising demand for all healthcare services, coupled with an ageing demographic and limited resources creates a challenge not seen in any other market.

Now, more than ever, we can see the strain our NHS is under and the importance it has in our economy. From secondary care and acute hospitals, primary care, community and mental health, retirement communities or care homes, everything that everyone does has one aim.

**“TO MAKE THINGS BETTER FOR
SOMEONE IN THEIR TIME OF NEED”**

The estate might only play one part to helping address this, but we are proud to continue to help contribute to that difference.



CHASE FARM HOSPITAL REDEVELOPMENT PROGRAMME

ROYAL FREE LONDON NHS FOUNDATION TRUST

Comprehensive redevelopment of this circa.40 acre site in the London Borough of Enfield. Montagu Evans provided multi-disciplinary planning and development consultancy services throughout the long-term redevelopment of the Chase Farm Hospital site.

Planning and viability secured permission granted in October 2015 for extensions to the existing hospital as well as new healthcare buildings (extending to circa.32,000 sq m) and redevelopment of the remainder of the site to provide up to 500 residential (C3) units.

In 2016 Montagu Evans advised the Trust on the disposal of one of the surplus parcels of land to the Local Education Authority and in 2017 we provided a Red Book valuation of the largest surplus land parcel, valued at £50m, which was sold to the Department of Education.



REDEVELOPMENT AND MASTERPLAN OF ROYAL EDINBURGH HOSPITAL

HUB SOUTH EAST

Acting as lead advisor to HUB South East in relation to the development of the Royal Edinburgh Hospital Masterplan, Edinburgh.

Montagu Evans submitted and progressed the application for planning permission in principle, in respect of the overall masterplan and taking forward a separate detailed application for planning permission in respect of Phase 1.

INDUSTRIAL & LOGISTICS HELPING TO THRIVE, NOW AND IN THE FUTURE.

The industrial and logistics market has faced unprecedented growth over the last few years, and with the e-commerce sector showing no sign of slowing this is set to continue.

Those who will be most successful are those who can refocus on new approaches in a changing environment to meet demand.

Pulling together deep sector expertise in investment, lease advisory, acquisitions, disposals and planning and development, we advise on all types of industrial and logistical real estate, from major logistics hubs to multi-let estates, urban warehousing and trade counters.

We can also look at non-core opportunities where there could be potential for a change of use or allocation to meet requirements.



MATRIX PARK EXCHANGE

SEGRO

Montagu Evans advised SEGRO on the acquisition of Matrix Park, Park Royal, for £140m. It comprises 256,000 sq ft of multi-let industrial accommodation and a 1.4 acre development site. The estate is fully let to seven tenants across 11 units.

In a property swap transaction, SREF acquired three multi-let industrial estates and one urban logistics unit in Greater London and two national logistics units in the West Midlands. The portfolio totals 880,000 sq ft and the assets totalled £205m. The balance of £65m has been paid by Schroders to Segro in addition.

The £140m acquisition of Matrix Park by Segro was completed in October 2021.



EGHAM BUSINESS PARK

GOYA DEVELOPMENTS AND BILSDALE

Purchase of a 5 acre site on Thorpe Industrial Estate on behalf of GOYA Developments and Biltsdale. Montagu Evans provided the client with development, leasing and marketing advice that produced interest from local and national occupiers. Once 4 pre-lets were found on the 105,000 sq ft development the estate was sold to Runnymede County Council.

Montagu Evans have been retained as letting agent for the remainder of the scheme by Runnymede and rents have increased from £12.50 to £15.00 per sq ft.

TOWN CENTRES UNLOCKING NEW OPPORTUNITIES.

The role of the town centre or high street has evolved to become less about shops, and more about local amenities, community, a sense of place and their management. Successful towns embraced their individuality to create a stable community, one that has ownership of its vision, understands its requirements for housing delivery, employment growth, health and wellbeing, connectivity and the confidence to embrace its purpose.

Our future is uncertain, but our places will always need to provide compelling offers and a diversity of use to thrive. We know that's not easy. Solutions are complex by their nature, often combining multiple stakeholders across private and public sectors. Having knowledge of the full development cycle and linking public and private imperatives can unlock value and help towns not only be resilient to change, but adapt and thrive.



CASTLE QUAYS SHOPPING CENTRE, BANBURY CHERWELL DISTRICT COUNCIL (CDC)

ASSET MANAGEMENT, PROPERTY MANAGEMENT,
RATING, CAPITAL MARKETS

- Cherwell District Council acquired Castle Quays SC in 2018.
- ME advised in the acquisition and viability for both the shopping centre and a development project with a leisure extension, a hotel and three restaurant units.
- ME created and implemented a Business Plan / Asset Management Plan for the repositioning of Castle Quay following the closure of the town's three departments stores.
- Our asset management role included the creation and delivery of Lock 29 – a community hub delivering street food, bars, and retail and events.



SHREWSBURY TOWN CENTRE SHROPSHIRE COUNCIL

ASSET MANAGEMENT, PROPERTY MANAGEMENT,
VALUATION, CAPITAL MARKETS, RATING

- Shropshire Council acquired three shopping centres in the heart of Shrewsbury totaling 537,000 sq ft.
- ME has been involved in defining and implementing a strategy for each centre.
- Consolidation of the retail offer within one centre (Darwin Centre), for which ME have been responsible for the project management of its refurbishment and subsequent tenant relocation strategy. This strategy has significantly improved the financial performance across all three centres.

RETAIL & LEISURE A SUSTAINABLE FUTURE.

With every market transformation comes opportunities and threats, trying to navigate through such a changing landscape, for property owners, is about identifying and maximising value for those retail and leisure assets that have a sustainable future and providing solutions for those needing to be repurposed. For occupiers helping them right size their store portfolios in the right locations and at the right price. The concept of value is much wider comprising financial, community and social metrics together with environmental aspects regardless of asset type.

By working with both the public and private sector, owners and occupiers we provide a unique view on retail and leisure assets, identifying opportunities outside the traditional high street norms. Working with the need of the consumer for cross sector use and opportunities, we recognise the time for exit, repurposing or redeveloping and as such have devised a 4-tier approach when reviewing assets: Retain, Reinvent, Repurpose and Re-gear.

With a team of sector specialists operating across planning and development, investment, agency, lease advisory, public sector, development management, rating and asset management, we collaborate closely to provide and deliver holistic and integrated advice and solutions to our clients.



SUPERMARKET AND RETAIL PARK ASSET MANAGEMENT

LEGAL & GENERAL

A longstanding instruction where Montagu Evans have historically acted in a lease advisory capacity, and when the Landlord client was then faced with the departure of several tenants.

Montagu Evans advised on the planning and redevelopment of part for a letting to Lidl in 22,000 sq ft, with an additional further letting to Dixons Carphone for their combined brands superstore format (Currys, PC World and Carphone Warehouse) and Pets at Home.

Our agency, lease advisory and planning teams are still advising on ongoing active management, which includes marketing the last unit of 2,500 sq ft.



THE CROWN ESTATE REGIONAL PORTFOLIO

THE CROWN ESTATE

Montagu Evans are lead planning advisors across The Crown Estate's Regional Portfolio covering more than 7 million sqft of retail and leisure space with an asset value of more than £2 billion. The portfolio comprises of 13 retail and shopping parks, 3 shopping centres, and 1 dedicated entertainment and leisure destination.

Advising on new developments such as Rushden Lakes, Fosse Park West and Silverlink Point, asset management initiatives including at Gallagher Retail Park, Cheltenham and Aintree Shopping Park and devising long term portfolio wide planning and engagement strategies.

Subsequently, Montagu Evans provided lease advisory and market information on the potential alternative options for assets within Hereford. This resulted in a lease re-gear with the existing tenant, Tesco.

LIVING PROVIDING SOLUTIONS FOR GENERATIONS.

At Montagu Evans, we understand the “living sector” can come under all shapes and guises, some of which include purpose-built student accommodation (PBSA), co-living, residential, build to rent (BTR), affordable, senior living and hotels. The rapid growth of this type of housing has created challenges such as spikes in supply, changes in planning policy and obligations, viability issues, political uncertainty and rental affordability. In order to address these challenges, we utilise a comprehensive understanding of the entire development cycle.

Working with private and public sector landowners, developers, institutions and Local Authorities, we bring together some of the brightest minds exposed to urban and suburban regeneration, viability, change of use, development, acquisition and disposal, joint ventures and partnerships to deliver a variety of private rented solutions to our clients.



BTR DEVELOPMENT SOUTH-EAST ENGLAND

Montagu Evans provided strategic planning, development consultancy and valuation advice in relation to the redevelopment of an existing office building and surrounding site.

This initially comprised a review of local planning policy and appraisal of various alternative uses to determine that redevelopment for BTR would be the most appropriate.

The Planning and Investment teams collaborated closely during the design process with the wider project team to ensure the most appropriate scheme in terms of unit mix, amenity space and operational efficiencies in order to maximise liquidity and value.

Following extensive engagement with relevant parties, including the Local Planning Authority, an application for the redevelopment of the site was submitted for the erection of a BTR block including commercial units at the ground floor.



STUDENT ROOST PORTFOLIO WARWICK AND BRIGHTON

Montagu Evans advised Student Roost on the forward funding acquisition of the Oaks 1 & 2, Warwick and One Moulsecomb Way, Brighton. The team provided a range of investment consultancy advice to underwrite the transaction including financial appraisals and in-depth analysis of the supply and demand dynamics.

Due to the complex nature of the transaction structure Montagu Evans assisted with drafting the developer funding agreement to ensure that it achieved the client's objectives. The portfolio comprised 1,387 PBSA beds, with McLaren Property, the developer, due to deliver the schemes for the 2020/21 and 2021/22 academic years respectively.

TRANSPORT & INFRASTRUCTURE IMPROVING CITY CONNECTIVITY.

Efficient and integrated transport networks are the foundation of our economy, having far-reaching effects on the environment and society. They can be a catalyst for transforming communities, unlocking new homes and employment opportunities.

With that comes the need for community engagement, an understanding of the relevant Local Authority and development opportunities as well as specialist expertise in statutory compliance, project delivery, operational constraints, valuation, asset management and rationalisation.

However, there's also stark differences between urban housing, office or retail developments being located near well-connected rail and other transport links versus development proposed in the grounds of rural homes and on greenfield land. Working for the public sector, developers, private businesses and landowners we understand the need for maintaining the tranquillity and environment of rural life as well as the desire to improve connectivity and efficient infrastructure; combining public and private sector expertise to advise on each and every opportunity.



POPLAR DLR DEPOT OVER SITE DEVELOPMENT

TRANSPORT FOR LONDON

Montagu Evans attended regular project meetings over the course of nine months, with consultants working closely together to solve the technical issues around delivering a deck and development above, as well as a new bridge link over, Aspen Way directly into Canary Wharf Crossrail station.

The team reviewed all potential uses and identified the most viable Over Depot Development (ODD) mix including up to 2,000 homes within a mixed use scheme, as well as phasing approach and affordable housing distribution. Working with KPMG we also identified potential Joint Venture structures and ran master appraisals to identify viability. 30 developers and contractors were approached with whom were considered to take on a role in delivering the development as part of a soft market testing process.



THAMESLINK MAJOR INFRASTRUCTURE PROJECT

NETWORK RAIL

Phased acquisition of land to facilitate the delivery of a major rail infrastructure project through Central London including Farringdon, Blackfriars and London Bridge Stations, as well as the Borough Market Area.

The project involved:

- Negotiation of commitments in response to TWA order objections
- Valuations and purchases in response to Blight Notices
- Permanent acquisitions and claims for relocation/ business closure and temporary acquisition of work sites
- Preparing expert evidence for Upper Tribunal proceedings
- Regeneration and development advice
- Landlord and tenant advice
- Route wide Property Cost Estimate

Delivering 150 acquired interests with the handover of property interests delivered on time, land assembly costs on budget and the majority of claims resolved by agreement.

HOUSING BRINGING FORWARD LAND OPPORTUNITIES.

Housing delivery has become one of the most pressing issues of a generation, for public and private sector landowners as much as those looking to bring forward new private and affordable homes.

We thrive on the fact that there is no "one size fits all" approach to identifying and bringing forward development opportunities. At the heart of everything is access to landowners, interpretation of market data and a clear understanding of objectives on all sides.

Working with public and private sector landowners, councils and developers as well as a range of professional service providers such as architects, project managers and lawyers, we bring together some of the brightest minds exposed to strategic land, change of use, development, acquisition and disposal, alternative uses, joint ventures and partnerships to deliver the best possible outcome.



MAJOR TOWN CENTRE REGENERATION

INLAND HOMES

Advised on the residential led comprehensive masterplan for a new urban quarter. Montagu Evans promoted and secured a site allocation through the Local Plan process for circa 1,750 residential units plus 250,000 sqft of commercial space.

The team coordinated preparation and submission of the requisite outline planning application for which planning permission was granted in August 2019. The application included a viability appraisal that set out the approach to affordable housing delivery throughout the implementation phase.

The first phase of Reserved Matters was lodged in November 2019.



REPURPOSED INDUSTRIAL ESTATE, MARSHGATE STRATFORD

WORKSPACE PLC

A 2.7 acre industrial estate with a planning consent to re-purpose this existing asset to provide a new 45,000 sqft office building for Workspace Plc with 254 residential units.

The objective was to engage with developers in a competitive informal tender that re-developed the existing asset in order to hand back a brand new office building for the Workspace portfolio with an additional capital receipt.

This objective was achieved with a greater capital receipt than anticipated.

Montagu Evans utilised their development, agency, viability and planning services to achieve this with the landowner and the developer.

OUR 5 YEAR COMMITMENT

As a partnership we believe it is not only our outstanding talent that maintains our reputation but also ensuring we meet the highest ethical standards when carrying out our business activities. As such, we are committed to recognising and acting on areas affecting skills and diversity, the wellbeing of our people, our environment and to ensure we create healthy, happy places.

PROMOTING SKILLS AND DIVERSITY - WE AIM TO:

1. To increase recruitment from non-cognitive backgrounds.
 2. Improved equality and diversity of gender, BAME and LGBTQ through the business.
 3. To deliver a talent development programme which establishes long term relationships with students from under-represented backgrounds.
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WELLBEING OF OUR PEOPLE - WE AIM TO:

1. Create an environment where people can prioritise their wellbeing.
 2. Offer competitive benefits that support all our people and their outside commitments/interests.
 3. Delivery of an L&D programme promoting wellbeing.
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PROTECTING OUR ENVIRONMENT - WE AIM TO:

1. Commitment to reduce, reuse and recycle through ongoing education.
 2. Committed to delivering ISO 14001 sustainability standard.
 3. Measured reduction in travel/CO2 omissions.
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TO CREATE HEALTHY AND HAPPY PLACES - WE AIM TO:

1. Commitment to deliver healthy places
2. Involvement in influential government and private sector networks to encourage debate and change.
3. Ensuring support and maintain education of "green" schemes and assets across the UK.

FOR MORE INFORMATION ABOUT
OUR THINKING AND WORK VISIT
MONTAGU-EVANS.CO.UK



FRAMEWORK PROVIDER FOR...



Homes
England

Crown
Commercial
Service
Supplier



TRANSPORT
FOR LONDON



Department
for Environment
Food & Rural Affairs



Places
for People



Peabody



ESPO | Framework
Supplier



Property
Services

Bloom*

"Opening up procurement"

Accredited Supplier

PAGABO

Simply better procurement