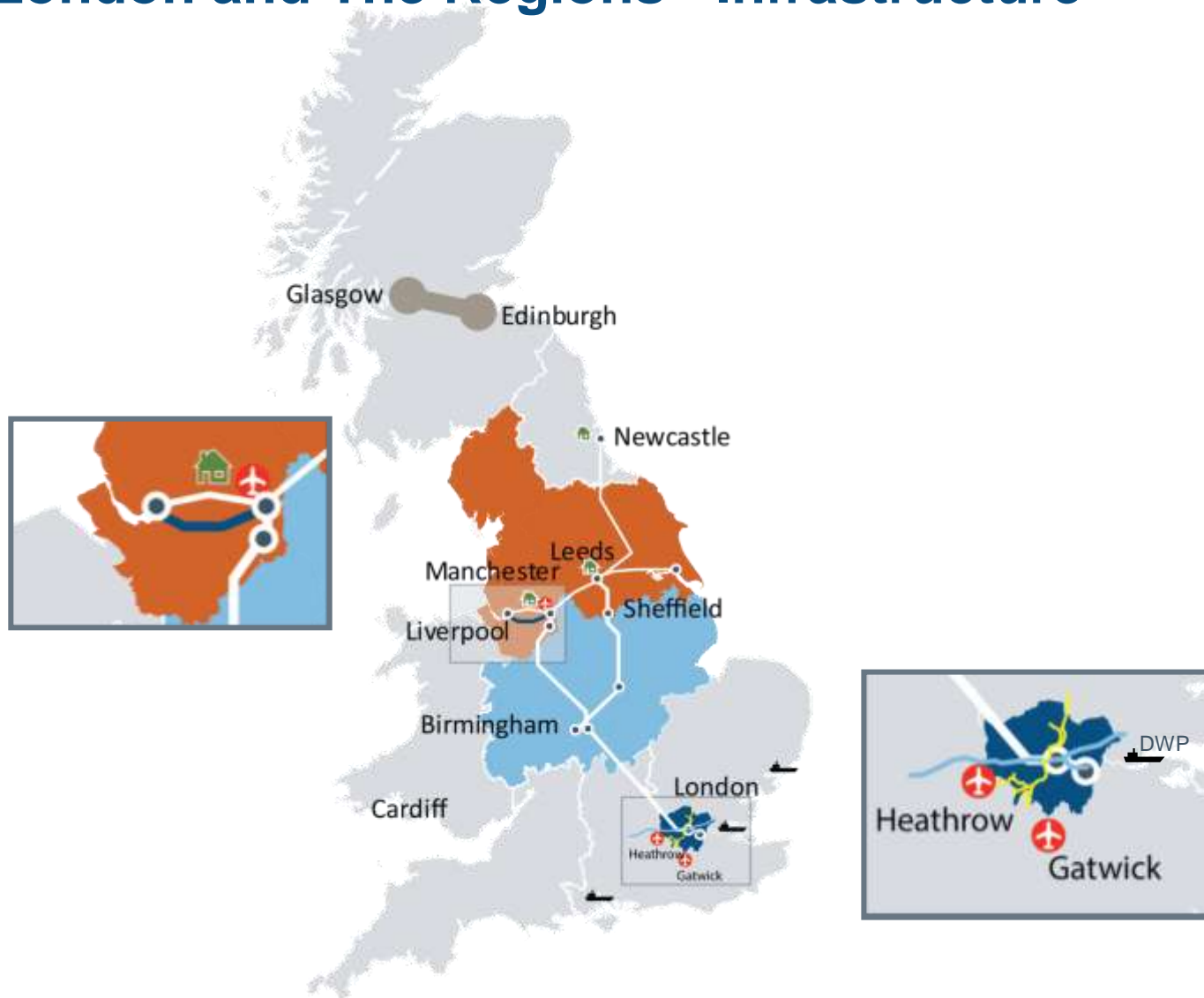


# London and The Regions - Infrastructure



Source: Fidelity International; HM Treasury Infrastructure UK

# London and The Regions – Economic Picture

## Scotland

**Population** 1.1 million

**GDP** £52 billion

**Main industry:** Manufacturing, Finance, Oil

## Midlands

**Population** 1.1 million

**GDP** £30 billion

**Main industry:** Business Services, Automotive, Life Science

## Northern Powerhouse

**Population** 5.4 million

**GDP** £130 billion

**Main industry:** Creative Industries, Biotech, Business Services

## London

**Population** 8.7 million

**GDP** £453 billion

**Main industry:** Finance, Business Services, Tech, Government



Source: Fidelity International; Oxford Economics, National Statistics, RCA. Size of circles denote population size.

# London and The Regions – 2015 Market Highlights

Scotland	
Investment Volume	£0.6bn
Largest Deal	c. £105m
Headline Rent	£32 psf
Glasgow Grade 'A'	15m sqft
Edinburgh Grade 'A'	11m sqft

Midlands	
Investment Volume	£1.3bn
Largest Deal	c. £285m
Headline Rent	£30 psf
Birmingham Grade 'A'	17m sqft



Northern Powerhouse	
Investment Volume	£2.3bn
Largest Deal	c. £300m
Headline Rent	£32 psf
Glasgow Grade 'A'	19m sqft
Leeds Grade 'A'	12m sqft

London	
Investment Volume	£11bn
Largest Deal	c. £575m
West End Grade 'A'	81m sqft
City Grade 'A'	92m sqft
Docklands Grade 'A'	18m sqft

Source: Fidelity International; GVA Grimley; JLL Research. Size of circles denote Direct Investment Volume for H1 2015