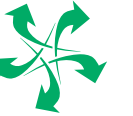
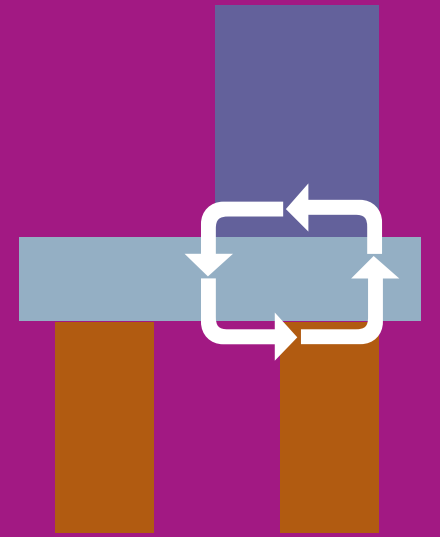


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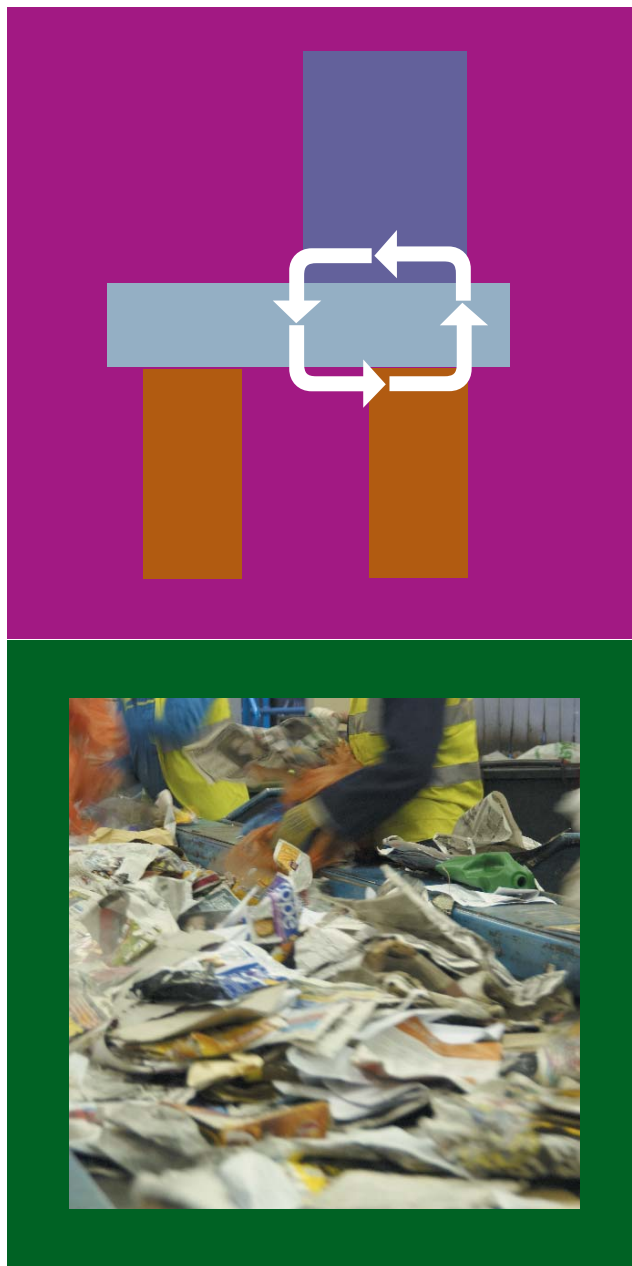
**LONDON REMADE**  
*The business of recycling*

# leave no footprint



**Transforming London's  
waste and  
reprocessing infrastructure**

February 2007



## What is Leave no footprint?

**Leave no footprint** is our solution to London's recycling infrastructure problem. It will expand capacity, create jobs and supply the market with materials ready to be made into new products.

**Leave no footprint** will deliver exciting, pragmatic and practical solutions. We at London Remade, are seeking partners who want to make money by building successful businesses managing London's waste resources inside the M25.

We want to transform the way waste is dealt with across London. New legislation, increased public awareness of recycling, climate change issues and rising waste disposal costs demand the transition from waste to resource management.

### Numbers

London produces 18 million tonnes of waste a year. This is expected to increase to 24 million tonnes by 2020. Government policy has focused on managing municipal waste with a clear bias in favour of long term private finance initiatives (PFIs).

PFIs will have a negligible medium term impact on reducing the London councils' exposure to additional costs under the Landfill Directive and has little influence on commercial, industrial, construction and demolition waste.

### The future

**Leave no footprint** will provide a platform and project criteria to design and implement innovative recycling and waste management facilities. We will offer sustainable resource management solutions for London's waste materials, whilst significantly decreasing the capital's carbon footprint.

**Leave no footprint** will create opportunities to reprocess all waste materials. Our long term solution is to address the market failure that exists within London's waste industry. It will help to build resource management facilities in London, to deal with London's waste in the most sustainable ways possible.

## Why change?

London has historically relied on cheap landfill as the final point of disposal for its waste, with large volumes of material being exported, mainly by road, to the Home Counties and beyond.

European Union (EU) and UK policy and regulation; the Mayor's regional policies on waste, planning and renewable energy; alterations to the Mayor's London plan and fiscal incentives are all driving the waste industry to use waste as a renewable resource.<sup>1</sup> London needs to develop recycling, reprocessing and disposal facilities to treat all types of waste efficiently.

The pace of change is too slow. Many London councils will be penalised for failing to meet their landfill diversion targets in 2010 and 2013. Aggregated permit costs up to 2013 could exceed £30 million across London.

Once the valuable recyclable material has been taken out of the waste stream, the residual material needs to become a renewable resource. We are working with the London Climate Change Agency, to identify synergies between waste disposal facilities and energy users.

London needs to bury its landfill habit. We know how to turn this vision into a reality. We are in the business of recycling, creating environmental solutions for a sustainable capital.

## Our solution

Our expertise is in:

- providing innovative, pragmatic solutions
- delivering short and medium term projects
- focusing on all waste streams: commercial and industrial waste, construction and demolition and municipal waste

Our solutions in **Leave no footprint**, focus on:

- identifying where the waste is generated
- projecting waste flows
- developing existing licensed waste transfer sites
- developing merchant facilities (speculative investments)
- projects below the PFI threshold
- creating markets for recycled materials
- high value waste streams and processing
- facilities that will meet the highest environmental standards
- residual waste as feedstock for clean technology creating renewable energy

"The way we manage our waste will have a major contribution to the climate change challenge. We need a radical injection of innovative technology and fresh thinking to rise to this challenge. We need to move decisively from traditional waste management processes to models which see waste as a resource to be recovered, recycled and reused. London Remade is taking a very important step in leading London towards a new era. Leave no footprint is a refreshing and welcome approach to managing London's waste more sustainably."

Jonathon Porritt  
Chair, Sustainable Development Commission

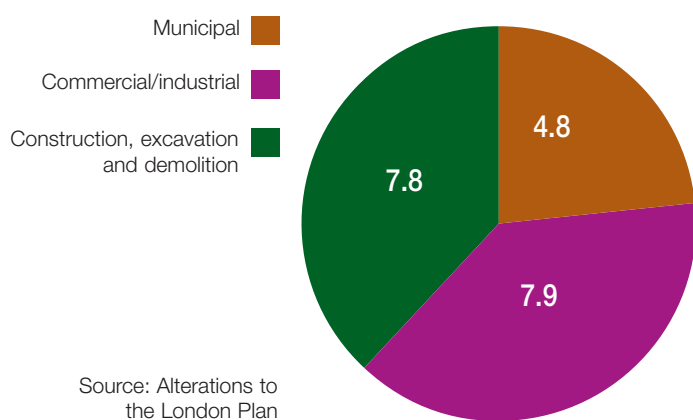


## What is the opportunity to invest?

Waste and recycling infrastructure is an increasingly attractive investment proposition. Many banks and financial institutions with experience of investing in renewable energy projects are now actively seeking to invest in waste.

London needs a medium term investment of £2 billion in its waste management infrastructure to meet its municipal, regulatory and diversion targets. A further £2 billion needs to be invested in the sustainable management of commercial and industrial waste across the capital. Other opportunities will be available for developing businesses that collect, sort, reprocess and refine recyclable materials.

Graph 1. 2010 estimated waste arisings



“London is a unique city, and the pressure is on to manage our waste more effectively. London Remade has set out the ideal platform for public and private sector partners to manage our waste more effectively. Leave no footprint is a timely and effective contribution to London’s waste management challenge. It represents just the kind of fresh thinking on waste management which the London boroughs are so keen to develop. It can help boroughs achieve their landfill allowance trading scheme (LATS) targets and therefore reduce the risk of penalties – thereby delivering both for the environment and for local council taxpayers. London Councils is pleased to support the Leave no footprint prospectus.”

Cllr Merrick Cockell  
Chairman, London Councils

Graph 2. London’s self sufficiency targets



Source: Alterations to the London Plan

The London Climate Change Agency is working to deliver low and zero carbon developments including renewable energy facilities. Investment is needed to fund projects relating to solar, wind and wave power, as well as residual waste.

**Leave no footprint** aims to secure sufficient reprocessing capacity to limit the risk of Landfill Directive non-compliance to 2013 and beyond. The facilities will greatly enhance London’s reputation as a sustainable city by contributing to the London 2012 Olympics and the Mayor’s 2020 London plan targets.

**Leave no footprint** will kick start resource management: breaking down barriers to change, acting as a catalyst for action, raising the expectations of Londoners and businesses alike in using waste materials as a valuable resource.

## Who should be interested?

### Public sector

The public sector will be involved in many of our projects, through planning, supply of materials and potential investment. Local authorities can act as the catalyst for change, either through their own procurement processes or by prudential borrowing or public private partnerships (PPP).

We are working with London local authorities and the Environment Agency to quantify London’s risk of non-compliance with the Landfill Directive. **Leave no footprint** offers a short to medium term alternative to PFIs.

### Reprocessors

If public and private sector targets are met, over 14 million tonnes a year of recyclable materials will be available in London for reprocessing. Even more materials will be available through more efficient and effective collection and sorting techniques. Higher quality materials collected will greatly influence the type of reprocessing required.

Currently most of these materials are reprocessed outside London, with an increasing amount sent for export. We are creating a map of material movements both to satisfy consumer concerns about what happens to their recycling and to produce data to support investment plans. Facilities will be needed to manage plastics, wood, cans, glass – in fact, all materials.

We have recently completed a major research study into the quantity and types of commercial waste in London.<sup>2</sup> We also manage [www.capitalwastefacts.com](http://www.capitalwastefacts.com) London’s unique database of public sector waste data.

We have a track record in helping businesses establish and grow, developing supply chains, identifying opportunities, facilitating networks and giving practical advice and guidance.

### Waste management companies

London needs capital investment to meet the Mayor’s London plan target to manage 85% of its own waste by 2020. Major infrastructure such as Crossrail, Thames Gateway and the London 2012 Olympics provide further opportunities for investment.

We will focus on waste management technologies which provide effective, sustainable waste solutions to meet London’s waste requirements. These will include anaerobic digestion, gasification, pyrolysis and a range of mechanical and biological treatments (MBT). **Leave no footprint** will create opportunities to bring these innovations to London, capitalising on our short supply chains and readily available materials.

We have the contacts who can make your business a success and we will work with partners to identify suitable sites, secure supplies of materials and establish markets for your end products.

### London Climate Change Agency

Residual waste management projects in London can provide substantial and reliable feedstock for renewable gases and fuels, biomass and renewable energy. The development of new technologies could generate hydrogen-rich renewable gases and fuels for use in decentralised private energy systems.

The development of the renewable energy market in London could help to further support the business case for investment in waste facilities, as it will offer a market for the end product of waste processes.

We will work with the London Climate Change Agency, London Development Agency and property developers to create and enhance markets for renewable energy and fuels.

### Financial institutions

The development of a sustainable waste solution for London will require significant investment over the next 10 years, in excess of £4 billion in infrastructure alone. Waste infrastructure represents an attractive investment opportunity.

We will work with key financial institutions to develop projects and minimise risk.

## Why London Remade?

We are a unique, forward thinking company, specialising in the delivery of pragmatic solutions to London's waste problems. As we are a not for profit business, our only interest is in delivering a more sustainable London.

We have a reputation for delivering projects that demonstrate how London's future waste management needs might be met.<sup>3</sup>

We have carried out intensive discussions with public sector partners, gauged the level of interest from financial institutions and started to map waste flows within London. We have also developed an initial pipeline of projects that meet the criteria set out opposite.

Our role within **Leave no footprint** will include:

- identifying projects, delivery partners and future opportunities
- identifying potential sites and providing advice on planning requirements and issues
- brokering and facilitating relationships between public, private, finance and operational partners
- finding materials and markets to reduce risk
- delivering added value markets for materials and creating new markets for recyclable materials

We know we can't do everything but, as an experienced networking business, we will lever in partners to offer legal, financial, due diligence, communications and construction expertise that will speed up project design, development and delivery; producing quicker results.

We will reduce costs and timescales, and pass on experience to future partners.

## More numbers

Transforming the way London manages its waste is a huge challenge. **Leave no footprint** will achieve:

- 2.5 million tonnes a year of landfill diversion
- 1,000 new jobs
- £200 million of investment
- reduced greenhouse gas emissions
- regional compliance with the Landfill Directive

## Who's involved?

Partners who have contributed to the development of **Leave no footprint** so far and will have a role in delivering projects in the future include:

- Greater London Authority
- London Councils
- waste planning, collection and disposal authorities
- London Development Agency
- London Climate Change Agency
- Environment Agency
- waste management and reprocessing companies
- Department of the Environment Food and Rural Affairs (Defra)
- financial institutions
- Waste and Resources Action Programme (WRAP)

## What are the qualifying criteria?

We are looking for projects that will:

- develop recycling, reprocessing and residual waste facilities
- minimise the environmental footprint and reduce CO<sub>2</sub> emissions in managing waste
- have an individual project value between £5 and £30 million
- supply a feedstock for renewable gases and fuels, biomass and green energy
- be able to handle a mixture of materials, irrespective of their origins
- make a positive contribution to municipal diversion targets

**Leave no footprint** will also support projects that:

- use either new or established technologies and processes
- involve companies operating outside London or the UK
- involve both small and medium sized enterprises (SMEs) and large companies
- demonstrate the highest possible sustainable development values (design, construction and delivery)

## What are the next steps?

We want to hear from potential partners and investors who want to make money delivering **Leave no footprint** projects.

### How to apply

Come and talk to us about how you can get involved.

Jamie Blake  
Director – Resource Management  
London Remade  
1 Quality Court  
Chancery Lane  
London WC2A 1HR

020 7061 6360  
jamie@londonremade.com

You will find an outline of the type of projects we are looking for, previous case studies, annexes and an application form on our website [www.londonremade.com](http://www.londonremade.com)

We look forward to doing business with you.

“Building infrastructure for a world city needs to take account of the whole environment and to optimise the use and reuse of its waste materials. London Remade has impressed me with its ideas to incorporate the reprocessing of waste materials within an urban setting; making London more sustainable by using waste as a renewable resource. Leave no footprint demonstrates this very well. This prospectus will not only transform the way the capital deals with its waste but also help grow London's reprocessing economy.”

Peter Head  
Director of Planning and Integrated Urbanism, ARUP

