

Brussels and Antwerp: pathways to a competitive future

April 2016

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**Urban Land
Institute**

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Contents

Acknowledgements	iv
Foreword	1
Executive Summary	2
Introduction	6
City Competitiveness	8
The Competitiveness of Brussels and Antwerp	12
<i>Brussels: An assessment of competitiveness</i>	
<i>Antwerp: An assessment of competitiveness</i>	
Assessment and Recommendations	24
References	28
Contributors	31

The full case studies of Brussels and Antwerp will be published on the
ULI Europe: website Europe.uli.org.

Acknowledgements

The preparation of this report was supported by a group of ULI Europe and ULI Belgium staff and members including:

Lisette van Doorn, CEO, ULI Europe

Marnix Galle, CEO, Allfin

Alexandre Lamot, Managing Director, A. Lamot & Co

G rard Philippon, Managing Director, Sopedi Real Estate Financial Products

Eric Verbeeck, Managing Director, APE N.V.

Lode Waes, CEO, Vanhaerents

The authors wish to thank all those in Brussels and Antwerp who contributed to the research through participation in workshops and interviews in March and April 2016, as well as the ULI Belgium Executive Committee and staff team. A list of those who gave exceptional assistance to the development of this report and the case studies is on page 31.

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Foreword

ULI is pleased to be publishing this thought-provoking report analysing the competitiveness of Brussels and Antwerp, Belgium's two largest cities. The report was launched at ULI Belgium's inaugural Annual Conference, themed around competitive cities.

The challenge of developing and maintaining a competitive edge is an issue of importance for cities around the world. In Belgium, this issue is framed by distinct pressures and challenges posed by the country's history and strategic role in Europe. ULI's research in cities around the world has found that investment in urban areas is on the rise. In addition, younger generations and talented workers are increasingly mobile, and are attracted to cities that offer both liveability and innovation. In this context, national and international competition amongst cities for investment and talent is significant. In order to position themselves to thrive in this context, Belgian cities need to address a variety of factors ranging from governance frameworks and regulatory issues to softer issues, such as liveability and social integration.

This report reviews the key competitive strengths and weaknesses of Brussels and Antwerp and makes a series of concrete recommendations. These will be useful to all those in the public and private sectors who wish to take action to enhance the competitiveness of these two cities.

We hope you will enjoy reading this report and that it will increase awareness of the issues surrounding the competitiveness of Brussels and Antwerp, and Belgian cities more broadly.

Marnix Galle

Chief Executive Officer, Alfin & Chair, ULI Belgium

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Executive Summary

Figure ES-1: Competitiveness Framework

Governance framework	Competitive climate	Agglomeration	Attractiveness to talent
Vision, strategy, and coordination	Costs and business investment	Size and scale of internal market	Human capital, liveability, and opportunity
Land use, planning system, and density	Tax and regulatory framework	Clustered specialisations	Innovation, technology, and enterprise
Infrastructure and services	Geopolitical risks	Institutional engagement	Brand, identity, and destination

Around the world, investment in urban areas is on the rise. To capitalise on this trend, cities must address a broad range of factors that affect their competitiveness, including investment climate, governance structures, and even urban form. This report assesses the competitiveness of Belgium's two largest and most globally connected cities, Brussels and Antwerp, and offers recommendations for how the cities can adapt to become more competitive.

The report is based on research carried out by ULI in early 2016 that included workshops with ULI members and other public and private sector leaders in Brussels and Antwerp, interviews with Belgian urban specialists, and a review of the two cities against recognised measures of international performance. In addition to this report, the research produced two detailed case studies of the competitiveness of Brussels and

Antwerp. The report and the two case studies are designed to be read together.

This report assesses Brussels and Antwerp's competitiveness using a framework that consists of four main elements:

- **governance framework;**
- **competitive climate;**
- **agglomeration;** and
- **attractiveness to talent.**

The findings regarding each city's competitive strengths and weaknesses according to the elements of this framework are summarised in figures ES-2 and ES-3. The areas in which each city rates above average are its competitive strengths; those below the average threaten the cities' competitiveness.

Summary of findings: Brussels

The following presents a summary of Brussels's strengths, the threats to its competitiveness, and recommendations for how to improve its competitiveness.

Competitive advantages

Brussels is internationally regarded as one of the 20 most important cities in the world, as a capital of European Union (EU) decision making, and the headquarters of the North Atlantic Treaty Organization (NATO).¹ As Belgium's major gateway for international finance and investment, Brussels has a number of competitive advantages, including the following (color-coded to match the competitiveness framework).



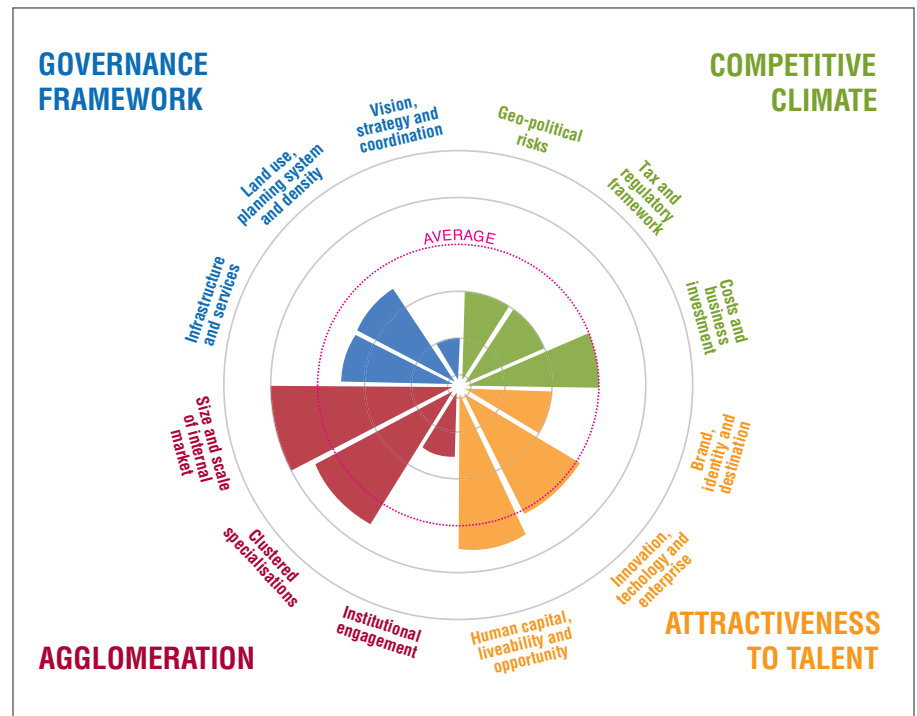
- A **diverse economy** that extends beyond its strategic political functions. The city is well placed to become a European leader in the circular economy, and many of its new incubator and accelerator spaces – particularly in the software, life sciences, and technology clusters – hold much promise.
- A **young and growing labour force**. Foreign workers are drawn by employment opportunities in EU institutions, as well as in the city's science, technology, and services sectors.
- Outstanding pan-European **transport connections**. These include rail links to cities such as Amsterdam, Frankfurt, London, and Paris, as well as excellent air cargo and passenger links to emerging markets.
- An effort to move towards a more **polycentric character**, as well as many opportunities to create more attractive development.

Competitive threats

Threats to the competitive standing of Brussels include the following:

- **Intergovernmental tension and weak metropolitan coordination**. Brussels's metropolitan governance is institutionally overcrowded, and the city lacks national support for its needs as the capital city. The city has few mechanisms to deliver long-term projects across municipal boundaries.
- The number of public and private bodies. A risk exists of **overlapping and duplicated interventions** that do not help the city capitalise and build on the benefits of agglomeration.
- Lack of effective promotion. The city's governing institutions do not effectively promote the city's many assets internationally, and the city suffers from the **lack of a clear brand and identity**.

Figure ES-2: Evaluation of Brussels according to 12 Competitiveness Criteria



- **Political and geopolitical risks** that create uncertainty for international investors. Disputes about the future of the federal state are ongoing, while terrorism and other threats to international security have recently become a more real and highly publicised danger.

Recommendations

Brussels can improve the competitiveness of its **governance framework** in a number of ways. These include implementing **governance reforms** and integrating how initiatives affecting economic development, policing, education, and housing are addressed and communicated. The city also can lobby for **revenue sharing** so it can capture more of the revenue generated by its commercial and political activities, and can create stronger mechanisms to **deliver long-term projects across municipal boundaries**. A focus on catalytic projects can also help break down barriers and address social imbalances. In addition, the city should **promote public transit and polycentric growth**.

To enhance its **competitive climate**, Brussels should work to better **match job creation to its population**. To address social and spatial segregation, economic strategy for the capital region and beyond should focus on creating jobs in lower- and middle-skill professions. The city can also work to **build its reputation domestically**, communicating the benefit to Belgium of having Brussels as its capital.

To improve the city's **attractiveness to talent**, Brussels can work to **enhance the city's brand and international positioning**. The city needs a more distinctive and authentic identity and image. Equally important is working to **enhance quality of life** in order to attract and retain a diverse international mix of future residents.

Summary of findings: Antwerp

The following presents a summary of Antwerp's strengths, the threats to its competitiveness, and recommendations for how to improve its competitiveness.

Competitive strengths

Antwerp, Belgium's major port city, has a record of investing in its urban core. The city has many competitive advantages over other current and historic European port cities, including the following:

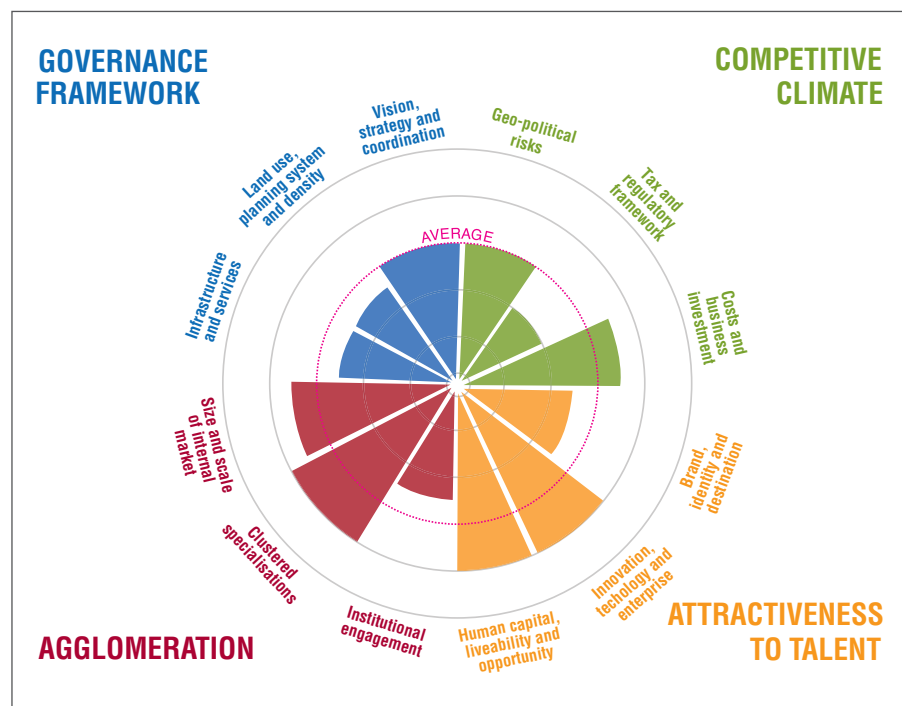
- Cross-sectoral developments that capitalise on the highly competitive port. Many successful, established industries help drive **agglomeration benefits in industry clusters**. Innovative industrial clusters exist in the areas of the digital economy and the circular economy, and these clusters share assets and resources. Promising new sites are being established for digital start-ups and chemical companies.²
- A ready pool of **skilled workers**. This labour force supports efforts to build the innovation economy, and new sectors benefit from **support from the city and private investment**.
- An improved **cost and incentives climate** to build the innovation economy. This climate is supported by active engagement from universities and risk capital.
- **Strong leadership**, and the city's status as a regional city. Because Antwerp is not a host for international institutions, geopolitical risks are less of a factor than in Brussels.

Competitive threats

The following are threats to Antwerp's competitive standing:

- **Traffic congestion**. Antwerp is a **relatively car-oriented city** whose 20th-century model of development is not well suited to increasing its competitiveness.

Figure ES-3: Evaluation of Antwerp according to 12 Competitiveness Criteria



- **Limited international profile**. Antwerp's limited international profile is potentially limits the growth of its innovation economy.
- **Need for greater institutional engagement**. Despite the role of the Chamber of Commerce and financial and research stakeholders in ongoing sector developments, institutional engagement, including engagement from knowledge and business institutions, could be improved.
- **Governance fragmentation**. Though not to the same extent as Brussels, fragmentation **at the metropolitan level** makes financial and development issues unduly complex. Also, innovative industries could benefit from more access to small and medium enterprise (SME) finance.

Recommendations

Like Brussels, Antwerp can take a number of actions to improve the competitiveness of its **governance framework**. These include greater **metropolitan coordination** – development of mechanisms that help Antwerp work with surrounding municipalities not only on transport but also to accommodate and absorb population growth and manage investment and land use change. The city would also benefit from a clear **metropolitan growth strategy** that identifies how and where to densify, and an infrastructure pipeline that shows how future sub-centres will be connected. The city also needs to invest in **transport infrastructure** to catch up with European competitors.



The Onze-Lieve-Vrouwekathedraal (Cathedral of our Lady) and the Scheldt river.
<https://en.wikipedia.org/wiki/Antwerp#/media/File:OLV-Kathedraal.jpg>

To enhance its **competitive climate**, Antwerp can work to **promote social cohesion and city living**. The city has opportunities to engage younger citizens more proactively through new infrastructure that enhances their aspiration for city living.

The city can also build on its already substantial **agglomeration** benefits by supporting sectors of the economy to **develop their profiles and autonomy**. Antwerp needs a resilient, innovation-led economy in the core city as well as the port.³

And finally, the city can improve its **attractiveness to talent** by working to **enhance the Antwerp brand**, improving the city's international profile in tourism, business, and innovation.

Conclusion

To improve their competitiveness, Brussels and Antwerp will have to combine long-term strategic planning with short-term actions designed to act as catalysts and create momentum. Both cities will need to make adjustments to urban governance and management that will enable them to execute these strategies. In addition to these individual actions, Brussels and Antwerp would benefit from greater inter-city collaboration. Through greater cooperation, the cities could focus on building strengths that are complementary, making Belgium as a whole a more attractive prospect for international investment.

Introduction

Brussels and Antwerp are the two most populous and most globally connected urban areas in Belgium. They are the only two Belgian cities among Europe's top 50 economic and population centres, and are the country's main engines of growth in globally traded sectors. Brussels is Belgium's major gateway for international finance, investment, and institutions, while Antwerp is the country's major port city with specialisms in logistics, manufacturing, diamonds, retail, and business services. Given their strong economic growth and their strategic location in the productive heart of Europe, these two cities offer the scale and global visibility to connect Belgium with the world.

This report assesses the current international competitiveness of Brussels and Antwerp and makes a series of suggestions for how the cities can improve and sustain future competitiveness. It is intended to inform debates within Belgium about city competitiveness and to highlight for an international investor audience the key assets and opportunities within the two cities. The assessment is based on research and analysis carried out by ULI in early 2016 that was designed to answer three key questions:

- In what ways are Brussels and Antwerp able to be competitive cities?
- Which risks threaten the competitiveness of the two cities?
- How can Brussels and Antwerp adapt to become more competitive?

City competitiveness

For economists, competitiveness is often equated with productivity.⁴ For cities, however, competitiveness is about a much broader range of factors. This report uses the following equation to define city competitiveness:

This broad definition is designed to encourage a robust consideration of the many factors that may influence why some cities are more competitive than others.

Methodology

The research for this report included historical and statistical research, a review of international indices and benchmarks, and interviews with Belgian urban specialists. This work led to the development of preliminary city competitive case studies of Brussels and Antwerp. Those case studies were used as the basis for discussion with ULI members and city representatives at workshops in both Brussels and Antwerp in March 2016. Information gathered in those workshops was used to update and improve the detailed case studies (published separately) and to inform this summary report.

This report also builds upon recent ULI research on density, technology, and innovation, in particular *Density: drivers, dividends and debates* (June 2015); *The Density Dividend: solutions for growing and shrinking cities* (October 2015); and *Technology, Real Estate and the Innovation Economy* (September 2015).

The competitiveness framework

This report applies a framework for evaluating competitiveness that builds on work by international organisations such as the World Bank and World Economic Forum. It assesses the competitiveness of Brussels and Antwerp based on 12 factors within four broad pillars:

- **governance framework;**
- **competitive climate;**
- **agglomeration;** and
- **attractiveness to talent.**

This framework includes, under the category of competitive climate, the issue of geopolitical risks. This is a distinctive addition to existing models of city competitiveness, which do not traditionally take this factor into account. Such risks are important when considering the competitiveness of Belgian cities given ongoing disputes about the future of the federal state, and the emergence of terrorism and other security threats. The risks became more serious and highly publicised internationally following the terrorist attacks of 22 March 2016 in Brussels.

Report overview

Section 2 of this report introduces and explains ULI's four-part framework for assessing city competitiveness. Section 3 uses the framework to evaluate the competitiveness of Brussels and Antwerp, identifying areas of relative strength, but also short- and longer-term challenges faced by each city. Section 4 presents a summary of the findings about the cities' competitive strengths and risks, and presents some recommendations for how both cities can enhance their future competitiveness.



City Competitiveness

For economists, including most famously Michael Porter, competitiveness has been largely equated with productivity. The concept of competitiveness has long been applied to companies, with firms being considered competitive if they are more productive and offer something distinct to markets in comparison with their peers. More recently, the term competitiveness has been applied to the territorial unit of a city or region, with productivity said by some to be the only meaningful definition of a competitive city.⁵

Over time, other economists and urbanists have argued that a narrow focus on productivity ignores the role of other potentially important factors, such as security, talent attraction, liveability, institutions, cluster development, leadership, coordination, vision, and trust. Productivity is now more commonly viewed as a necessary but insufficient condition for city development.⁶ Instead, a “competitive city” is now considered one that:

- attracts a high share of mobile talent, capital, and business;⁷
- provides a favourable entrepreneurial, institutional, social, and technological framework and infrastructure platform for local firms;⁸ and
- sustains these private, public, or mixed assets to achieve long-run competitive advantage.⁹

This all means that for cities, competitiveness involves much more than just productivity; all the factors in the following equation play a role:

This equation implies that for a city to be competitive, productivity must be backed up by mechanisms to coordinate economic development, promote the city externally, and achieve long-term sustainability.

Understood in this way, competitiveness is what allows cities to enable their businesses and industries to create jobs, drive innovation, increase productivity, attract investment, and build shared prosperity. In the context of cities, competitiveness also needs a public purpose. This definition accommodates the different needs of businesses, investors, anchor institutions, tourists, students, and residents, and the different factors that affect their decisions as “customers” of a city.

A framework for assessing city competitiveness

As recent studies by the World Bank and World Economic Forum show, no quick recipe exists for becoming a competitive city.¹⁰ This report adopts a framework for understanding and assessing competitiveness that is made up of four categories and 12 distinct dimensions (see figure 1).



Figure 1: Competitiveness Framework

Governance framework	Competitive climate	Agglomeration	Attractiveness to talent
Vision, strategy, and coordination	Costs and business investment	Size and scale of internal market	Human capital, liveability, and opportunity
Land use, planning system, and density	Tax and regulatory framework	Clustered specialisations	Innovation, technology, and enterprise
Infrastructure and services	Geopolitical risks	Institutional engagement	Brand, identity, and destination

Governance framework

Vision, strategy, and coordination

In competitive cities, leaders create a long-term vision and strategy for the future designed to improve productive capacity. In order for a vision to translate into action in a city, coordinated leadership focused on the city's shared economic future is required. Cities that have created inspiring and deliverable visions around competitiveness usually do the following:

- identify the city's competitive position globally;
- set out a clear pipeline of future infrastructure projects and the investment tools that will finance them;
- point to opportunities for foreign investment and emerging export markets to catalyse growth; and
- mobilise different levels of government around a common set of objectives.

Land use, planning system, and density

The conversion of land use and targeted densification is a key aspect of change in most if not all European cities, no matter their growth profile. As ULI's 2015 report *Density: drivers, dividends and debates* explained, density is a competitive advantage because it offers lifestyle benefits for different demographic groups, provides sites that are easy to package for investors, and increases transport efficiencies.¹¹ If cities are to make progress towards what this report describes as "good" density, they need a robust growth plan, master-planning tools, and land powers to guide how development can proceed.

Infrastructure and services

Extensive and reliable hard infrastructure systems are the foundations of competitive advantage in globalised economies that rely on point-to-point movement of goods and people within and between regions. In terms of transport, rail links, roads, ports, and air links provide workers with access to jobs and enable

businesses and entrepreneurs to bring their goods and services to market. Reliable electricity networks and digital and telecommunications infrastructure also provide the platform for companies to conduct operations and share information with confidence. Competitive cities have high rates of infrastructure investment and coverage, but also look to create robust long-term infrastructure portfolios, speed up approval processes, and encourage better coordination of decisions regarding infrastructure and other public services. When these ingredients are missing, cities can become congested, and certainty for investors diminishes.¹²

Competitive climate

Costs and business investment

The cost of doing business is among the most important considerations for a firm considering where to locate its operations. Office and industrial space rents, energy costs, and labour costs, as well as other indirect costs, must be competitive and stable in order for a city to attract businesses. Of equal importance, business investment is essential for cities seeking to improve productivity. Business investment creates multiplier effects by generating new jobs, increasing the stock of capital and technology in a city, and boosting economic activity. Cities need financial markets where private sector capital investment is widely available, whether from banks, securities exchanges, private equity, venture capital, or other funds.¹³

Tax and regulatory framework

The legal and administrative framework in which companies, investors, and individual actors operate strongly shapes competitiveness and growth. High burdens or uncertainty can negatively influence investment decisions and affect the way businesses are organised. Often cities' competitiveness in this area will be shaped by national tax, regulation, and incentive frameworks, and the challenge will be to make national regimes more simple, straightforward, and attractive.

Geopolitical risks

The medium- and long-term competitiveness of cities is often shaped by political and geopolitical changes and risks. These can include trade disputes, military conflicts, terrorism, failing states, and the integration and disintegration of regional economic blocs. Figure 2 illustrates three ways that such risks can affect the investment attractiveness of a city.

Figure 2: How Geopolitical Risks Can Affect City Competitiveness



Agglomeration

Size and scale of internal market

The size of the customer and client market in and around cities allows firms to maximise economies of scale in the way goods and services are produced and distributed. Market size and scale foster specialisation. Larger markets also usually reduce the per capita costs of infrastructure and offer increasing returns on investment. The potential to sell products to a larger market also provides greater incentives to generate new ideas. For smaller cities, the ability to 'borrow scale' and create critical mass amongst a group of cities offers a complement to the local market. Competitive cities not only have access to large markets; they are also well placed to supply the right mix of products and services given the character of supply and demand in their region.

Clustered specialisations

Many cities seek to become competitive by leveraging specialisations, whether these are industry clusters, headquarters or institutional operations, niche technologies, business climate, or natural commodities. Deep, high-quality business networks and collaboration in specialised clusters are vital for upper-income cities where much of the 'low-hanging fruit' to improve productivity has been exhausted. The range and expertise of local suppliers and the frequency of their interaction affect how new products and techniques are developed. Established clusters also usually reduce barriers to entry for new and up-and-coming firms.

Institutional engagement

Engaging public, private, and civic institutions are an important dimension of sustaining competitiveness for cities. Because urban economic development is a long-term and geographically broad activity, it relies on wide institutional collaboration – with universities, media, businesses, and community interests. Engaging these stakeholders in economic and development strategies and reconciling their interests with those of residents are key tasks for cities. Proactive, bold, and socially responsible civic and private institutions often play a role in maintaining high standards and reassuring investors and consumers. When civic and business institutions are allowed to participate, they can bring an ethos of efficiency and innovation to the dialogue between stakeholders across a city's development system. They can even overcome constraints faced by local and city governments because they are able to think beyond electoral cycles and look beyond political geography at the interests of the whole metropolitan area.

Attractiveness to talent

Human capital, liveability and opportunity

Human and social capital are essential to city competitiveness. Education and skills are major drivers of new ideas, entrepreneurship, innovation, and growth. Cities at all income levels must prioritise developing the human capital that sustains competitiveness. Making cities more liveable by expanding and diversifying educational, cultural, and recreational amenities is key to attracting high-calibre international talent. A capable and flexible labour market also helps cities create new types of jobs.¹⁴

Innovation, technology, and enterprise

The development and implementation of new solutions, products, and technologies is an essential aspect of city competitiveness. To be competitive, cities not only have to increase their supply of human capital; they also must create innovation ecosystems that match skills to demand, allow a culture of enterprise to flourish, and support companies seeking to enter the marketplace. Research and development capabilities are fundamental, as are 'softer' forms of innovation, and usually rely on strong links among universities, scientific research, companies, and capital. An innovation economy also depends on rapid adoption of new technologies as part of the daily activities of businesses, and very well-protected intellectual property. Cities with an advanced innovation system do not just 'sell' innovations; they also help generate profits through the efficiency gains their innovations enable. Cities that have a culture of openness to new and disruptive ideas are also often 'first-movers' when it comes to absorbing and implementing new solutions, business models, and consumption models.¹⁵

Brand, identity and destination

With ever-increasing international competition for investment, cities need to present a distinct identity to investors, residents, students, and other institutions. Competitive cities typically have a reputation for high standards and aspirations in the markets that matter to them. Effective branding strategies can also help galvanise socially and economically fragmented cities around a shared purpose. Improving the sense of the city as a destination or as a place offering a high quality of life is particularly important in countries that do not have a reputation for providing unique experiences or opportunities.¹⁶

The Competitiveness of Brussels and Antwerp

Compared with other regions of the world, Europe has fewer large global cities and more medium-sized and smaller competitive cities. Europe depends on these competitive 'middleweight' cities and metropolitan areas for a substantial proportion of its global trade and investment. These cities have to compete much more on quality than quantity and on innovation rather than size. Brussels and Antwerp are two such cities: their economies are among the 40 largest metropolitan economies in Europe and generate substantially more output than the next largest Belgian cities, Liège and Ghent.

Historically, Belgian cities have been in the middle of the 'blue banana', an arc of development where most of Europe's productive capacity and competitive advantage is located.¹⁷ This arc is still a strong feature of the European system of cities and a major driver of European competitiveness. But the disruptive effects of the current cycle of globalisation have brought new requirements for European cities to restructure economically in order to respond to changing global markets in a context of increased debt, new tools, and reduced public transfers.

Figure 3: Belgium's Five Largest Cities

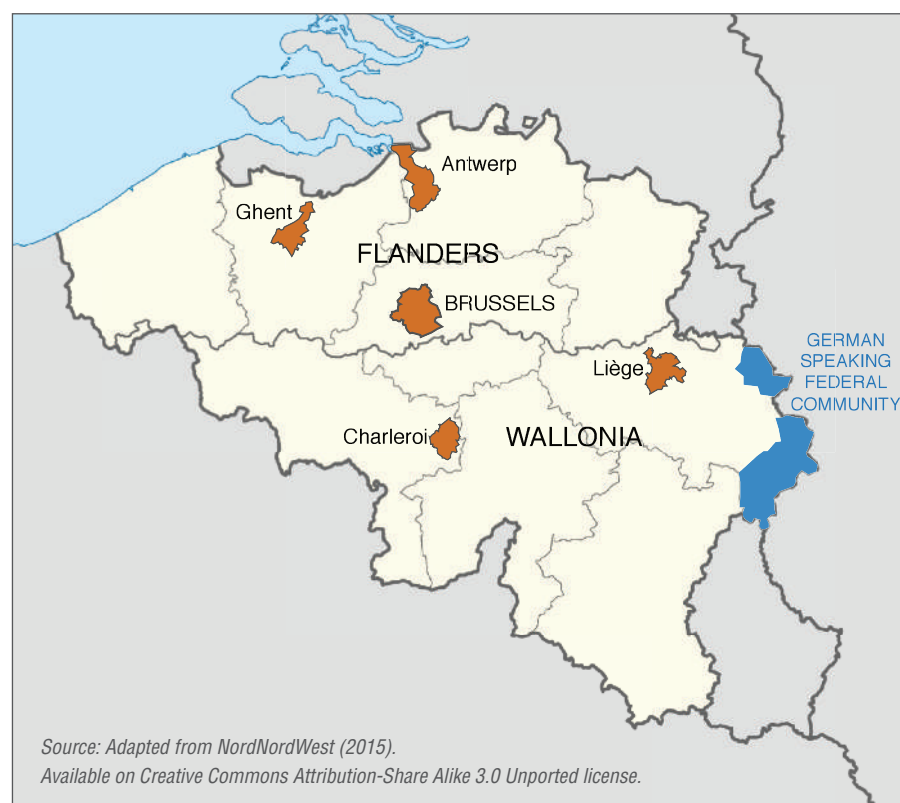


Figure 4: Key Statistical Data for Belgium's Five Largest Cities

Rank	Metro area	Region	Core city population, 2014	Functional urban area population, 2014	Gross value added (GVA) of metro area, 2012	Rank in Europe
1	Brussels Capital Region	Brussels	1.2 million	2.6 million	€102 billion	12
2	Antwerp	Flanders	510,000	1.1 million	€37.2 billion	40
3	Liège	Wallonia	390,000	740,000	€16.2 billion	95
4	Ghent	Flanders	250,000	590,000	€15.8 billion	97
5	Charleroi	Wallonia	200,000	490,000	€11.1 billion	120+*

Source: Eurostat Urban Audit (2014), available at <http://ec.europa.eu/eurostat/web/cities/data/database>; accessed March 18, 2016. GVA data and European rank data taken from OECD Stat. (2016). Metropolitan Areas, available at <https://stats.oecd.org/Index.aspx?DataSetCode=CITIES>; accessed March 18, 2016; based on 2010 dollars at exchange rate of \$1.325/€. Charleroi data based on NUTS3 region 2012 data.

* Charleroi data based on separate data set; no exact ranking possible.

Brussels and Antwerp are part of the federal state of Belgium, which is constitutionally made up of three regions, Wallonia, Flanders, and the Brussels Capital Region, and three communities, the Flemish Community, French Community, and German Community. Each of these legal entities has its own parliament and government, with powers and competencies in specified areas. The only exception is the Flanders region, whose powers are combined and executed by a single parliament and government. This means that, in addition to its federal government, Belgium has five state-level parliaments and governments.

The Flanders region is more affluent and economically dynamic than Wallonia, and a separatist movement has long been present there. The question of what would be done about the Brussels Capital Region presents a persistent stumbling block to the separatist cause. Antwerp falls within the Flanders region while Brussels lies within the Brussels Capital Region (which is officially Franco-Flemish bilingual).¹⁸

Brussels and Antwerp have both experienced significant population growth over the past 15 years. Brussels is one of the fastest-growing metropolitan areas in northern Europe and has a very young and international demographic profile. Antwerp has an older age profile but also is growing as it re-establishes itself as a leading maritime hub, with its port at the centre of a broader logistics and value-chain management system.¹⁹

The economic performance of both cities has been solid rather than spectacular in recent years. Although both cities are much more productive than the rest of Belgium, productivity growth has been weak over the past decade. Brussels has a fairly low employment rate—below the average in Belgium and EU metro areas. Antwerp has a higher percentage of people employed but overall output has been modest.

Figure 5: Location of Belgian Cities within 'Blue Banana' of European Development



Source: Authors

Figure 6: Regions and Communities of Belgium

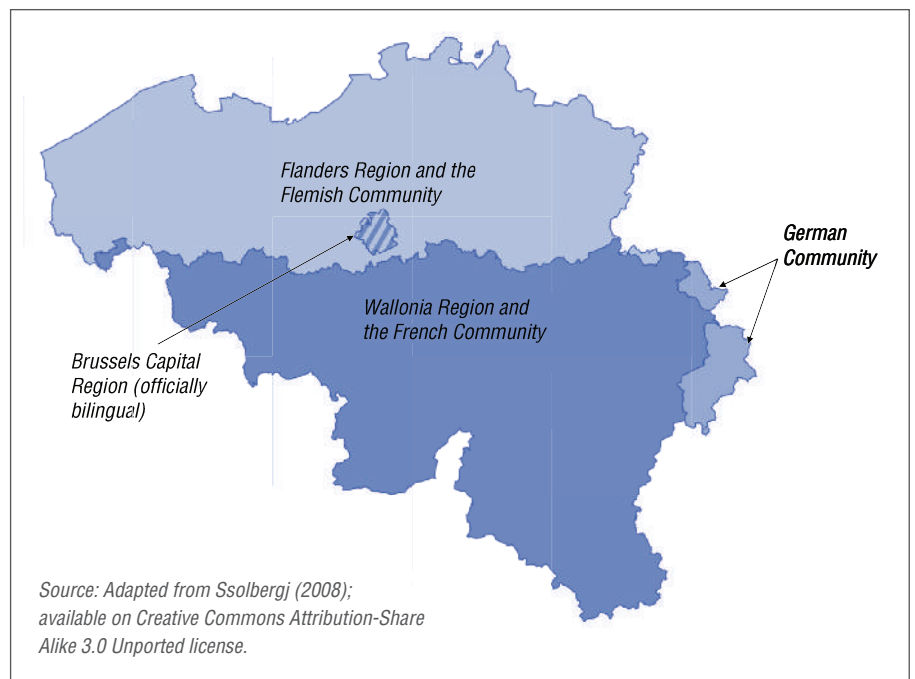


Figure 7: Population and Economic data for Brussels and Antwerp

	Population			Economy			
	Total pop.	Pop. change 2000-2014 (%)	Old age dependency ratio	GDP change, 2000-2013 (%)	Productivity*	Productivity growth, 2000-2013 (%)**	Employment rate (%)
OECD European metro average	-	+7.8	27.0	+22.1*	\$88,400°	+12.4°	66.1
Belgium	11.2m	+9.4	27.3	+18.4	\$96,400	+7.7	62.2
Brussels	2.6m	+15.0	22.7	+19.1	\$132,900	+5.1	60.1
Antwerp	1.1m	+9.6	27.3	+18.3	\$108,400	+6.0	64.7

Source: OECD Metropolitan Database

*Productivity defined by OECD as the ratio between GDP and total employment **Data not comprehensive across all European OECD areas ° 2012 figures.

Figure 8: Brussels Performance in Six Leading Indices

	AT Kearney Global Cities Index	IESE Cities in Motion	Mori Global Power City Index	UN-Habitat City Prosperity Index	fDi Intelligence European Cities of the Future	Economist Intelligence Unit Liveability rankings
	2015	2015	2015	2015	2016	2015
<i>No. of Cities measured</i>	125	148	40	60	294	140
1 Paris	3	4	3	5	2	29
2 Vienna	18	6	10	6	26+	2
3 Berlin	17	25	8	11	20	20
4 Frankfurt	23	28	11	-	4	15
5 Amsterdam	25	5	9	13	7	26
6 Stockholm	33*	24	15	3	8	24
7 Copenhagen	43*	15	19	2	15	22
8 Brussels°	12	33	25	14	26+	27
9 Madrid	16	35	22	22	26+	38
10 Rome	32*	68	-	-	26+	44

*based on 2014 results

° Indicative rank obtained by calculating the average percentile position of each city in each ranking.

Brussels: An assessment of competitiveness

Brussels' performance in international indices and benchmarks highlights a city that has fallen behind its European peers (defined as metropolitan areas with similar populations, economic structures and income levels). The city performs strongest in categories that measure institutional depth and influence, but underperforms on quality of city systems, sustainability and resident satisfaction rankings.²⁰ The city is typically ranked in the top 25 in all-round assessments that measure between 40 and 125 global cities' 'power' or competitiveness, and performs strongest in categories that measure institutional depth and influence.²¹ It ranks 13th for headquarters

concentration according to IBM's *The World's Most Competitive Cities* index and its highest all-round position of 12th is in AT Kearney's *Global Cities Index* which weights Brussels' EU institutions more heavily than other studies.²² Its international rail and air links ensure the city is ranked in the top 20 in most transport and infrastructure indices that measure between 40 and 150 cities worldwide, despite high congestion, and it is a top 15 events and conferences destination (among over 350 cities globally). The city also performs well for life sciences, but there is no one area or sector where Brussels has a really outstanding specialisation.

City indexes increasingly measure the performance of city systems, environmental outputs and social dimensions. Brussels performs weakly for sustainability, while its modest R&D output and high unemployment factor negatively in many indices. The city's brand and reputation is respectable but is some way behind other western European capitals, reflected in modest visitor numbers.



Governance Framework

Vision, strategy, and coordination

Brussels has excellent international connections and institutions. However, it **lacks strong leadership and vision about what kind of city it ultimately wishes to become**. Brussels's city leadership is widely regarded as too insular and lacking in ambition to communicate the city's assets on the world stage.²³

Urban governance in Brussels is institutionally overcrowded. The existence of 19 empowered municipalities effectively **prevents an integrated governance model**. Social and political divisions among municipalities are barriers to creating collaborative strategies to regenerate disadvantaged areas and ensure cohesive mixed-use development. Instead, numerous authorities and agencies create fragmented initiatives. This situation is compounded by the fact that the span of the city government (Brussels Capital Region) is far too small to shape most of the metropolitan region. Some steps have been taken to increase harmonisation. The Bruxelles 2025 economic strategy brings together different tiers of government and private actors to make the city a centre of entrepreneurship in Europe. However, substantive reforms to governance in Brussels are notoriously difficult, especially at the metropolitan scale.

Brussels's horizontal governance complexity is compounded by vertical issues. The federal state and the Brussels and Flanders regions have different responsibilities and interests, and have little incentive to collaborate on Brussels's key challenges, such as education and cohesion.

Land use, planning system, and density

Brussels is a denser city than it was 20 years ago. Within the city limits, **Brussels is trying to move towards a more polycentric character** through mixed-use densification, mainly in the second ring. Eleven strategic zones have been identified, the largest being the Canal Zone, a project which will be critical to creating a liveable city and addressing deprivation. The city has large swathes of industrial wasteland and vacant buildings, and many opportunities to create more attractive development. Political and spatial fragmentation means that **Brussels also does not have a strong record of creating neighbourhoods that embrace the principles of 'good density'** as outlined by ULI. Many higher-density areas are associated with social exclusion. At the same time there is an undersupply of housing given the demographic boom. Beyond the city, smaller cities at the edge of the metropolitan region face the political choice of whether to embrace growth or try to retain their small and semi-rural character.



Infrastructure and services

Brussels on paper has **a competitive infrastructure platform**, especially in terms of external high-speed rail, air cargo, and visitor links. Internally, the city suffers from **severe congestion**, a result of earlier development patterns that have left Brussels socially and physically fragmented. About half of all city jobs are taken up by non-resident commuters, but the wealthier districts and provinces outside Brussels do not contribute to financing urban infrastructure. Given the **underinvestment in public transport**, this model has contributed to a high level of car use. Fortunately, in the next five to ten years Brussels is set to gain a fast and integrated suburban railway network (the Réseau Express Régional Bruxellois, or RER), which will extend to the edge of the metropolitan region and may catalyse a shift from a monocentric to a more polycentric city. A North–South metro route and improvements to tram lines will also add welcome capacity, especially at peak times.

“Brussels is not beyond redemption. Indeed, there are already signs in some parts of the city that improvements can be made, albeit constrained by a frustrating lack of coordination and a reluctance to set aside party and linguistic differences.”

- Tim King, *Politico*, November 2015²⁴

Competitive Climate

Costs and business investment

The volume of Brussels's **cross-border real estate investment** is **still robust**, ranking 12th in Europe and 38th worldwide. But the city remains just 21st among 27 cities in ULI's 2016 *Emerging Trends in Real Estate® Europe* report for development and investment prospects,²⁵ due among other things to a high reliance on public sector office deals and low retail occupier confidence.

Office rents have been falling in Brussels since 2013 due to relatively modest demand, and the use of commercial incentives is widespread. Feedback at the ULI workshop highlighted that despite the reliance on foreign investment to fuel the development of Brussels's key sectors, **the inefficiency of the Belgian federal system acts as a brake on decision making** and results in higher taxes that create disincentives to investors.

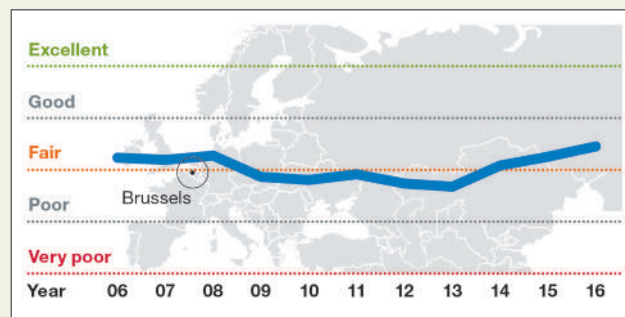
Tax and regulatory framework

Brussels's business climate has many advantages. **The regional government has tried to improve assistance for its higher-growth sectors** by putting in place better finance, advice, and infrastructure, all of which have been lacking in certain areas. The rationalisation of economic development institutions and more targeted financial assistance are important steps in the right direction,²⁶ but the city has had limited success at supporting small business growth.

Geopolitical risks

Brussels is subject to three distinctive political and geopolitical risks which pose important questions about the city's investment attractiveness.

First, the city's role as a gateway to Belgium and the EU may be cast into doubt by **internal political debates**, or even Belgian separation in the future.²⁷ Brussels belongs to neither Flanders nor Wallonia, and has been likened to 'the neglected child of divorced parents'. The Flanders and Wallonia regions currently do not work together in a way that would promote the development of the wider metropolitan area.



Investment prospects for Brussels from 2006 – 2016, as rated by respondents to the *Emerging Trends in Real Estate®* survey. Image credit: PwC and ULI.

Second, Brussels is experiencing greater **terrorism and security threats**, most recently seen in the bombings of the airport and Metro system on 22 March 2016. These threats may not abate quickly.

Finally, Brussels is a diverse and multicultural city. Many of its districts have large populations of first- or second-generation immigrants, and some are perceived as poorly integrated. The continuing suburbanisation of affluent populations exacerbates **social segregation**. A lack of multi-ethnic cohesion may also be viewed as a potential barrier to successful development.

“Like Berlin, Brussels is underpopulated, meaning that office space and accommodation is far cheaper than in cities such as London or Paris, or even Amsterdam... [but] local venture capital firms are thin on the ground. Brussels' proximity to London, Paris and Amsterdam means the big private equity firms do not bother to set up a permanent base in the city.”

- **Financial Times**, November 2015 ²⁸

Agglomeration

Size and scale of internal market

Brussels is a sizeable market, with over 5 million people in its metropolitan area. The city also boasts a central location within a country of more than 11 million people. However, diseconomies of agglomeration occur because **urbanisation is poorly managed and per capita costs of infrastructure are high**. The office market has become split, with many large headquarters having moved to the airport zone outside Brussels to escape traffic. Because there is a lack of continuity and coherence in the way that institutions implement policies in Brussels, and because infrastructure has not grown in accordance with demand, the returns to technology and knowledge development have been suboptimal.

Clustered specialisations

Many examples of clustered specialisation exist in Brussels. The information technology cluster (multimedia and software) is fairly advanced, combining international companies, SMEs, and incubators. In the past, initiatives to support creative clusters were fragmented, but the new Mediapark forthcoming in east Brussels is set to provide a major new space for media firms. The life sciences cluster is nurtured by many teaching hospitals, and an established pharmaceutical cluster south of Brussels concentrates all the research centres.

Institutional engagement

In contrast with many of its peers, Brussels lacks a single empowered business leadership group to provide a unified voice to support a city effort to undertake the next phase of economic development and with knowledge of how to develop mutually reinforcing clusters. The number of public and private bodies means there is still **a risk of overlapping and duplicated interventions** that do not help the city capitalise and build on the benefits of agglomeration.

“Belgium’s largest city is sometimes seen as the checkbook-balancing foil to freewheeling Antwerp 30 miles north... [But] Brussels has quietly emerged as one of the continent’s most exciting creative hubs.”

- *New York Times*, December 2015 ²⁹



Attractiveness to Talent

Human capital, liveability and opportunity

Brussels has a **young, dynamic, and international talent base**. The reason for this goes beyond the presence of EU institutions and affiliates.³⁰ Despite its reputation as a 'one-company town', Brussels has genuine potential to become a leader in sectors such as software, life sciences, and green technology, and also has productive innovation strengths in aircraft components, food industries, clothing, chemicals, and electronics.

While Brussels has many highly skilled workers, it is also home to a large poor and underskilled population. A complex and underfunded inner-city school system, combined with limited policies on developing skills, has resulted in a two-tier labour market.³¹

Innovation, technology, and enterprise

Brussels has many assets to foster innovation: a large pool of well-educated workers and a strong focus on sciences and technology in its many research hubs.³² Several new mixed-use innovation districts and incubators are being established around the city. The city's new **circular economy strategy** aims to speed up the transition to a waste-free economy and turn environmental goals into economic and job opportunities.³³

The city's office stock requires some modernisation and adaptation. Initiatives to support commercial sectors have been fragmented in the past, and competition between the regions still leads to R&D subsidies not being used optimally.

Brand, identity and destination

Brussels benefits from its status as the headquarters of both the EU and NATO. However **political fragmentation is a barrier to developing a clear brand identity for the city**. Despite calls a decade ago to position itself as a European capital, the city has not yet been able to do so.³⁴ Processes of suburbanisation and regional autonomy have deprived Brussels from being able to leverage its real size and plan ahead strategically.³⁵



Compared with other European cities, **Brussels's quality of life and quality of place fall short**. Resident satisfaction recorded in the EU's largest tri-annual survey is a good deal below the European average, especially on issues of safety, trust, housing quality, and affordability.³⁶

“ There are lots of good things going on in Brussels – good projects and positive experiences. But they aren't being properly communicated [to the outside world]. People aren't proud of their city. ”

- ULI workshop participant, Brussels, March 2016

Antwerp: An assessment of competitiveness

Whilst Antwerp does not have the scale to be considered on most international benchmarks – it does not rank among the 200 largest city economies worldwide – it punches above its weight where it does show up in rankings, especially for economic and investment potential. Antwerp ranks in the top 120 cities in the world for its international corporate networks and its innovation capacity.³⁷ Its relatively strong growth profile means it is rated among the ten leading medium-sized cities in Europe for

economic potential by fDi Intelligence in 2016, and it outperforms its size as the 66th city worldwide for overseas real estate investment.³⁸ Compared with cities of its size, Antwerp has a fairly high concentration of science and technology specialisations and high R&D spending, and registers a strong retail presence.³⁹ The biggest concern for Antwerp in indices is high road congestion and air pollution, and relatively modest tourism and business visitor traffic.

Governance Framework

Vision, strategy, and coordination

Over the past decade, Antwerp's city leadership has been characterised by professionalism, proactiveness, and experience in delivering key projects. Antwerp's politics are perceived to be moving away from a preoccupation with social rights and protections and towards a more entrepreneurial approach to achieve job security and prosperity. **The city is currently viewed to have strong and visionary leadership**, with a mayor who is prepared to bring forward large-scale and ambitious projects that can absorb future population growth. Metropolitan coordination in Antwerp remains complex but has improved in the past decade, especially on transport projects. The Flanders region also provides support for most aspects of city development and is an enabler of the city's competitive aspirations.

Land use, planning system, and density

Antwerp has a medium-density inner city that rapidly turns into a low-density landscape in the suburbs.⁴⁰ Most of Antwerp's affluent population still lives at the edge or outside the city, encouraging car dependency, preference for single-family houses and parking, and **fairly high segregation by income and building use**.

Antwerp has densified much of the city centre, picking the 'low hanging fruit' of vacant lots and easily convertible sites where opposition to redevelopment is minimal. The focus of the city's next Spatial Structure Plan is to **create extra capacity and mixed-use functions** by densifying the urban belt beyond the city centre. For example, the north axis on the left bank of the river, offers significant space for more housing and mixed-use functions next to growing port-related industries. It is also a priority to upgrade the belt of development around the ring road to make housing more attractive and less segregated.

Infrastructure and services

In terms of infrastructure, the Port of Antwerp is an outstanding asset and is currently undergoing a much-needed cycle of modernisation to stay competitive. The port needs to be served by more efficient road, rail, and barge transport. **The city lacks public transport capacity** in general after decades of neglect and suffers from severe congestion.

Antwerp's competitiveness as a logistics hub will benefit from the new Liefkenshoek rail tunnel, freight railway lines, and the long-awaited completion of the ring road. The city also aims to maximise tram connections over the next three to four years and to expand the role of water transport and bicycle use. Over a 10- to 15-year period, these developments have the potential to change established patterns of travel across the city.

“*In Antwerp, politicians have a weight and political personality. They have vision and are dynamic. They are making ambitious plans.*”

- ULI workshop participant, Antwerp, March 2016

Competitive Climate

Costs and business investment

Investors in Antwerp have to address **complexities in regulation and landownership** that are a result of the many tiers of government that play a role in the city. Perception at the ULI workshop was that the time and money it costs foreign investors to learn which tier is responsible for different regulations can act as a deterrent.

Tax and regulatory framework

Antwerp's business friendliness has improved in recent years and is boosted by investment incentives and tax subsidies from the Belgian and Flemish governments that are linked to employment, training, and R&D. Belgium's tax environment offers deduction of risk capital, advance tax rulings to provide clarity and confidence, and subsidies for environmentally friendly technology. The Flemish region-owned company PMV invests in equity and provides credit guarantees to a mix of firms in order to improve access to finance.⁴¹

Geopolitical risks

Antwerp's competitiveness is affected by a history of social fragmentation and uncertainty about the federal state. The city is at the centre of ongoing separatist pressures. In addition to his role as

Antwerp's mayor, Bart de Wever is a vocal leader of the Flemish independence movement. However, this may not be as big a threat as it seems: many in Antwerp think separatism is perceived to be a more significant issue abroad than it is internally.⁴² Under de Wever's leadership, the city is viewed by many commentators to have clamped down effectively in the areas of law and order and terrorism. But perhaps more pressing is **the challenge of social cohesion** within the city: Antwerp is one of just 11 cities among 79 in Europe where more than half the residents believe that foreigners are poorly integrated.⁴³

ULI workshop participants believe that citizens have largely become accustomed to working with the backdrop of separatist pressures and do not view Belgium's political and territorial instability as a major competitive concern for Antwerp. The city's key port and location advantages would remain in any future political configuration. Nonetheless, uncertainties may create a negative impression with investors. **Political divisions also prevent Antwerp from being able to build a compelling identity and international visibility,** or to clarify its long-term relationship with Brussels and other Belgian cities.



Redeveloped dock area Eilandje, Antwerp

Source: K. Beyers, 2015 (CC-BY-NC-3.0)

Link: <https://commons.wikimedia.org/wiki/File:Eilandjeantwerp.jpg>

Agglomeration

Size and scale of internal market

Antwerp's internal market is relatively small, at 1.1 million people in the metropolitan area and less than 2 million in the wider province. However, **the capacity for productive agglomeration is greatly enhanced by several assets**. These include the diverse and cross-fertilising port activities, the increasing integration of the value chain, and the improved links among the port, the city, and other areas of northern Belgium and the Netherlands. Cross-sectoral developments around the circular economy are also having knock-on effects on Antwerp's clusters, helping them share assets and resources in a way that drives agglomeration.

Clustered specialisations

Antwerp's competitiveness is boosted by one of the largest integrated chemical clusters in Europe, plugged into the port. Specialist industries exist across the whole value chain, from raw materials to final products. The port is attractive to companies because it can combine raw-materials suppliers with logistical support and financial services. A new 'plug and play' model incubator for sustainable waste management is being developed in support of the cluster, with financial support from multiple tiers of government. There are signs that **the integration of the port and chemical cluster is reinforcing the strengths of each sector** in terms of talent, infrastructure, brand, and business-to-business cooperation.

Beneficial effects are also observable in Antwerp's creative clusters (fashion, new media, design, advertising) spanning several distinct city-centre neighbourhoods.

Institutional engagement

Agglomeration in Antwerp is supported by **actively engaged institutions and organisations**. The Flemish enterprise network Voka – the Antwerp-Waasland Chamber of Commerce and Industry – engages more than 3,000 companies through lobbying and support services and has prepared the city's Roadmap 2020 to secure the future of the port-related sectors. Meanwhile, knowledge institutions and risk capital providers are very active in many of the new innovation initiatives such as BlueChem and StartupVillage.

“As the hype around Berlin ebbs just a little, now there is a new city in focus. Antwerp. One reason is that here you can find one of the best fashion and art academies in the world, the Royal Academy of Fine Arts.”

- *Glamour magazine, Germany*, November 2015 ⁴⁴



Attractiveness to Talent

Human capital, liveability and opportunity

A skilled and talented workforce is one of Antwerp's major assets. The city has a highly educated labour force with a strong science and technology output, and many high-quality postsecondary degree programmes that feed into its established sectors. The Flemish people are highly multilingual because of the region's location at the confluence of Anglo-Saxon, Germanic, and Latin languages. Antwerp depends on a new, younger workforce to provide the fiscal and social foundations to support a large aging population.

Innovation, technology, and enterprise

In addition to its dynamic port, Antwerp has emerging strengths in the circular economy, such as waste management (including sustainable chemistry) and clean technology. New innovation spaces are being established for digital economy startups and chemistry companies. The startup ecosystem is growing through private incubators and city initiatives such as StartupVillage. The city's creative clusters (which include fashion, design, and advertising) are also flourishing under the radar. Each of these sectors is small in terms of employee numbers, and the main challenge for them is to create visibility and internationalise.

The University of Antwerp and applied research institutes in the city play an increasing role in supporting the city's innovation economy and consolidating expertise. However, structural collaboration between the University and entrepreneurs is still limited compared with the synergies in Rotterdam, Eindhoven, and elsewhere.

Brand, identity and destination

Antwerp has a fairly positive record over 25 years of reinvesting in the urban core to make it more attractive and attract residents and visitors. Relative to others in Europe, Antwerp residents are very satisfied with living standards, health care, and job availability. Safety, social integration, and cohesion in Antwerp are also concerns raised in the 2016 European Commission Eurobarometer public opinion survey.⁴⁶

Antwerp has a clear and positive identity within Belgium, but there has been limited consideration of the city's international identity. As a result, Antwerp does not currently possess a strong international brand compared with other European cities of its size and assets. Stronger branding is a work in progress. The city now aims to present itself as a "metropolitan village" – with the diversity of an international metropolitan area but at the scale of a village in terms of comfort and quality of life.

“The country's capital of cool, a powerful magnet for mode moguls, club queens, art lovers and diamond dealers.”

- Lonely Planet, 2016⁴⁵

“Antwerp's residents are happy with their city because it offers many of the qualities of a metropolis, but on a human scale. This adds to its competitiveness.”

- ULI workshop participant, Antwerp, March 2016



Assessment and Recommendations

Belgium's two leading cities are at the heart of the most productive region of Europe. Both possess a highly educated, multilingual pool of labour with a record of above-average productivity. By European standards, they have a strong record of GDP growth over the past decade, and their real estate remains comparatively affordable. Brussels and Antwerp must build upon these assets to consolidate and enhance their competitive positions in the European system

of cities. Both cities must take action to ensure that those risks which threaten their competitiveness are not realised.

This section summarises the findings in section 3, presenting each city's main strengths as well as the key threats to competitiveness, and offers recommendations for future action. For each city, a chart categorises competitive strengths and weaknesses. The indicative performance of each

city is plotted relative to international peers of comparable size and assets, mostly in Europe but also beyond.⁴⁷ The areas in which each city rates above the average are the cities' competitive strengths – to build upon and nurture going forward. Those below the average pose risks and threats to the cities' competitiveness, limiting their capacity for managed growth and potentially undermining investor confidence.

Brussels

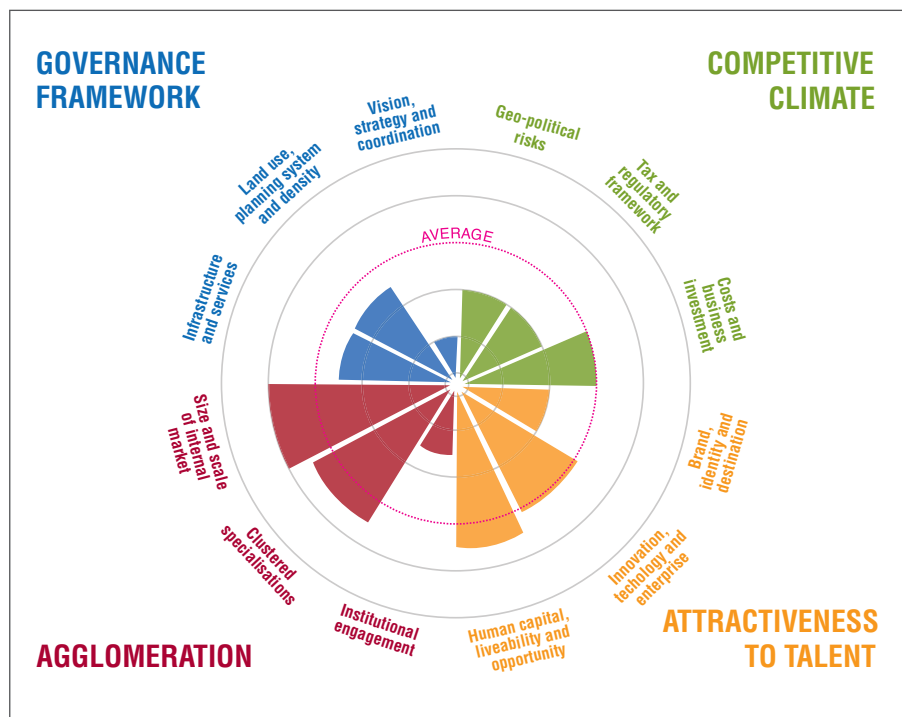
Figure 9 presents a summary assessment of Brussels according to the competitiveness framework used in this report. This assessment is based on the analysis presented above (and in the accompanying case study) in comparison with nine peer group cities: Amsterdam, Berlin, Copenhagen, Dublin, Madrid, Rome, Toronto, Vienna, and Washington, D.C.

Competitive assets

Brussels is above average in two areas of agglomeration—**size of market** and **clustered specialisations**. The city has a diverse economy well beyond its strategic political functions. It is well placed to become a European leader in the circular economy, and many of its new incubator and accelerator spaces, particularly in the IT, life sciences, and technology clusters, hold much promise. **Innovation, technology, and enterprise** is another area of relative strength for Brussels.

The other area where the city is above average is in **human capital, liveability and opportunity**. Brussels is young and growing, in particular thanks to foreign workers drawn by EU institutions and by clustered specialisation in the city's science, technology production, and services sectors. The relatively low cost of real estate means Brussels also performs reasonably

Figure 9: Evaluation of Brussels according to 12 Competitiveness Criteria



well in the category of costs and business investment. Strong international infrastructure links and efforts to move towards a more polycentric character and regenerate the inner city help Brussels score above average in **infrastructure and services**, as well as **land use, planning, and density**.

Competitive threats

While Brussels is internationally regarded as one of the 20 most important cities in the world, it is below average in **brand, identity and destination**. Brussels's governing institutions do not yet effectively promote the city's many assets internationally. A lack of social cohesion and problems with the integration of foreigners may also be a barrier to successful and well-managed development.

Vision, strategy, and coordination is another area where there is room for improvement in Brussels. The overall institutional framework is severely overcrowded, not surprising given that citizens effectively vote to elect four or five different tiers of government (district, city, province, region, federal). Efforts to determine core tasks for each level of government are highly charged and divisive, and in practice city leaders have to constantly use negotiation to build capacity to act. This context poses a threat to effective **institutional engagement**. The number of public and private bodies means there is a risk of overlapping and duplicated interventions that do not help the city capitalise on and build on the benefits of agglomeration.

This lack of coordination can also increase the risks posed by **geopolitical factors**. The threat of terrorism is also faced by other European capitals, such as London, Madrid and Paris, but most of these cities have metropolitan tools they can use to address them. Domestically, the fraught nature of multilevel governance prevents any sustained leadership agenda from taking hold in Brussels. Intra-national conflicts and debates are an unwelcome distraction from the real challenge of establishing a more competitive framework for Brussels to flourish.

Recommendations

This report offers recommendations for Brussels in each of the three competitive arenas where it is facing the most significant competitive threats.

Governance framework

Implement governance reforms. Reforms to governance in Brussels are notoriously difficult, but there is an imperative to integrate the way issues involving the economy, policing, education, and housing are addressed and communicated. To address the governance risks, the city could coordinate amongst economic bodies to support new tech sectors and resolve confusion about responsibilities, and develop stronger leadership from business and civic institutions to support urban governance.

Develop metropolitan-scale collaborations.

Brussels needs reforms that will enable it to capture more of the revenue generated by its commercial and political activities. This includes mechanisms to share costs with surrounding municipalities where much of the professional population lives. The city also needs to encourage productive collaboration amongst the agencies of the Brussels Capital Region, Flanders, and Wallonia, and create stronger mechanisms to deliver long-term projects across municipal boundaries.

Deliver catalytic projects. Much rests on the pace and momentum achieved by major projects such as the Canal Zone. These projects are essential in breaking down barriers and addressing social imbalances. Brussels may need new implementation mechanisms to cut through some of the inter-municipal political division and manage the process of change in a coherent long-term fashion.

Promote public transit and polycentric growth.

The shift from motorised traffic to public transport is essential to relieving congestion in inner-city Brussels and achieving sustainability goals. The RER system has the potential to catalyse cohesive development in the second and third rings of the wider region, but will need the support of one or more secondary cities to demonstrate what sustainable densification might look like.⁴⁸

Competitive climate

Match jobs to population. To address segregation, economic strategy for the capital region should focus on creating jobs in lower- and middle-skill professions, such as tourism, construction, retail, and logistics in the wider region. Concrete and high-profile projects will be important to encourage specialisation and prepare younger generations for the future job market.

Build Brussels's domestic reputation.

Communicate the benefit to Belgium of having Brussels as its capital, such as its tax yield, access to international markets, financial expertise, role as gateway to tourism, education and training facilities, complementary sectors, and an improved business brand for Belgium.

Attractiveness to talent

Enhance the city's brand and international positioning. Brussels's political and diplomatic role is unique. It has significant physical assets, including green space, historic buildings, and affordable housing. However, the city needs a more distinctive and authentic identity and image. The city should work to promote its assets internationally and build on these to develop a clear vision for the future of Brussels.

Enhance quality of life. Brussels can promote its lively areas and catalytic projects such as the Canal Zone in order to attract and retain a diverse international mix of future residents and ground its EU functions more actively in the real city.

Antwerp

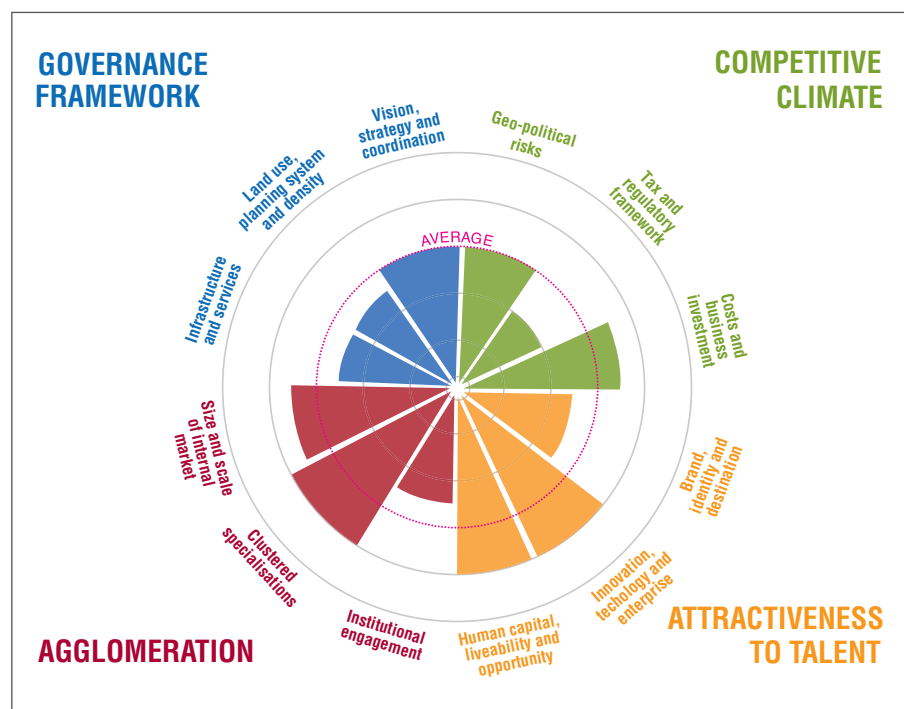
Figure 10 presents a summary assessment of Antwerp according to the competitive framework used in this report. This assessment is based on the analysis presented above (and in the accompanying case study) in comparison with nine peer group cities: Bristol, Gdansk, Genoa, Gothenburg, Hamburg, Lille, Liverpool, Rotterdam, and Utrecht.

Competitive assets

Like Brussels, Antwerp performs well in the areas of **human capital, liveability and opportunity** and **Innovation**, technology, and enterprise. The population is highly skilled, and the city has a diverse economy with many well-established sectors. Opportunities exist to broaden the scale and profile of its most successful creative industries, including fashion, diamonds, and design, while new sectors benefit from private incubators and city initiatives. The digital and circular economies are at the heart of the city's future innovation economy, and promising new sites are being established for digital start-ups and chemical companies.

Clustered specialisations are an important strength for Antwerp. The port remains highly competitive, and much of the infrastructure to support its trade growth and logistical efficiency is in development. While Antwerp lacks Brussels's size, assets like the port mean that the **size of the city's internal market** is sufficient to benefit from the effects of agglomeration. Cross-sectoral developments are helping Antwerp's clusters share assets and resources in a way that drives agglomeration.

Figure 10: Evaluation of Antwerp according to 12 Competitiveness Criteria



Antwerp also is above average in terms of **costs of business investment**. The city has improved its cost and incentives climate to build the innovation economy, supported by active engagement from universities and risk capital. Antwerp's governance structures are not as complex as those in Brussels, and the city benefits from strong leadership, helping score it better than the capital in the category of **vision, strategy, and coordination**. Similarly, its status as a regional city rather than a host for international institutions means **geopolitical risks** are less of a factor than in Brussels.

Competitive threats

Two of the biggest threats to Antwerp's competitiveness relate to the city's governance framework. Antwerp is a congested and relatively car-oriented city whose 20th-century model of development is not well suited to the competitive and innovative edge it will need to show in the future. A focus on **infrastructure and**

services, in particular public transport alternatives, is essential if Antwerp is to scale up its innovation economy and bring forward projects that attract investment. Overcoming entrenched preferences for the private car will be a key part of making public transport developments a success and will help make the city's **land use, planning system and density** more conducive to future growth.

In order to expand its innovation economy, Antwerp must address the risks in the area of **brand, identity and destination**. The city's limited international profile is a potential threat to the growth of its innovation economy. **Institutional engagement**, including engagement with knowledge and business institutions, could be improved. The city has begun to engage private partners in joint ventures, and more will be needed to avoid further decamping from the centre to the green fringes.

Though not to the same extent as Brussels, Antwerp is affected by risks in the area of **tax and regulatory framework**. Governance fragmentation makes financial and development issues unduly complex, and innovative industries could benefit from more access to SME finance.

Recommendations

This report offers recommendations for how Antwerp can improve its competitiveness in each of the four areas.

Governance framework

Metropolitan coordination. Antwerp has begun regional cooperation around transport. The city will need to build on this by developing robust coordinating mechanisms with surrounding municipalities to develop joint approaches to accommodating and absorbing population growth and managing investment and changes in land uses.

Metropolitan growth strategy. Although Antwerp has a clear roadmap for its high-growth clusters, the city needs a guiding economic and spatial prospectus if it is to achieve a step change in the pace and scale of its growth

management solutions. This should include agreement on how and where to densify and plans for an infrastructure pipeline that shows how future sub-centres will be connected.

Transport infrastructure. At the moment Antwerp is only in position to start catching up with other European cities in transport infrastructure rather than moving ahead of the curve. Investment in smart mobility and real-time monitoring of transport systems could accelerate its progress. The city has to make strategic decisions about what set of tram and light-rail projects to pursue in the future because it needs both radial and tangential lines.

Competitive climate

Social cohesion and city living. Social fragmentation and political disengagement are exacerbated by the fact that many of the city's wealthy professionals live outside the city limits and commute by car.⁴⁹ This is an outmoded lifestyle for a city of Antwerp's size and significance. The city has opportunities to engage younger citizens more proactively, including through new infrastructure that enhances their aspiration for city living.

Agglomeration

Sector profile and autonomy. Antwerp needs a resilient, innovation-led economy in the core city as well at the port.⁵⁰ Leveraging the port to create a smart logistics economy is an important objective. The circular, digital, and creative economies are critical going forward, but require effective organisation – including stronger linkages with schools, universities, and financial providers – and greater international visibility.

Attractiveness to talent

Enhance the Antwerp brand. Antwerp needs to create the sense of destination that can attract the young people it needs to serve an aging population. Improving the city's own international reputation in tourism, business, and innovation can also provide a shared confidence and purpose.

Conclusion

The recommendations outlined are not just things which it would be 'nice' for Brussels and Antwerp to do eventually. All Belgian cities are operating in, and competing with, a network of increasingly savvy and well-managed European metropolises that are making their own reforms and becoming more competitive and investment friendly. If Belgium's two leading cities are to catch up with their rivals and contemplate moving ahead in future, they must begin to implement changes at a faster pace and at a larger scale than in the past.

In addition to these individual actions, Brussels and Antwerp would benefit from greater inter-city collaboration – both between the two cities themselves and with other major cities around Belgium. Through greater cooperation, the cities could focus on building strengths that are complementary, making Belgium as a whole a more attractive prospect for international investment. City leaders must move beyond everyday political issues and constraints to bring together local, city, regional, and federal bodies around a shared development approach.

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- (i) index performance, based on more than 100 international city indexes and three nation-based indexes;
 - (ii) comparative data evaluation of factors such as governance fragmentation, density, and fiscal tools;
 - (iii) evaluation of city government documents, visions, and strategies;
 - (iv) insight gained from ULI workshops in Belgium, and;
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ULI would like to acknowledge the following people who assisted with the development of this report and the case studies by taking part in research workshops and interviews.

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Alexis Duvieusart	OAK3
Marnix Galle	Allfin
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