



Grow with Warsaw

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Peer-to-peer learning is achieved through the knowledge shared by members at thousands of convenings each year that reinforce ULI's position as a global authority on land use and real estate. In 2018 alone, more than 2,200 events were held in about 330 cities around the world.

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Dedication

“I wanted Warsaw to be great. Both my colleagues and I were making plans of a great Warsaw of the future. And Warsaw is great. It happened sooner than we thought. And although where we wanted parks are barricades, although our libraries are burning, although the hospitals are burning, the city of Warsaw, defending the honour of Poland, is today at the highest point of its greatness.”

— **Stefan Starzyński**, Mayor of Warsaw, 1934 to 1939

Stefan Starzyński, Mayor of Warsaw, 1934 to 1939¹

In the early 1930s, Warsaw had a huge gap in its budget. City development was halted by lack of funds while the population grew rapidly. Due to the serious lack of funds for the city's development and Stefan Starzyński's experience in economics, he was chosen on 1 August 1934 by the Sanacja (Sanitation, a political movement in Poland) to become the mayor of Warsaw with special powers. Local units of self-government were disbanded and Starzyński became responsible for the city government. He soon gained considerable popularity, even from former enemies, after quickly reforming the financial system.

Some of his most notable achievements that were due directly to the money saved from his reforms and clever investments were the reducing of unemployment, bringing electricity to the suburbs of Wola and Grochów, paving all major roads leaving Warsaw, and connecting the city with the newly built northern area of Żolibórz through a bridge over the northern railway line. These actions and achievements garnered Starzyński the nickname “the Mayor of the Suburbs.”

Starzyński was also popular among the residents of the borough of Śródmieście (city centre) for his beautification programmes, which included the planting of trees and flowers along the main streets. A large park in Wola was created under his orders as well as several other minor green areas throughout the city. During his mayoralty, he also enlarged the city of Warsaw towards the south. The borough of Mokotów's former airfield, Pole Mokotowskie, was split into two parts by Aleja Niepodległości (Independence Avenue), which today is one of Warsaw's main streets.

A number of important facilities and other projects were initiated by Starzyński during his mayoralty, including the National Museum, a new city library building, a new building for the Warsaw School of Economics (his alma mater), and the Powszechny Theater, which became one of the most influential scenes of Warsaw. Other initiatives of Starzyński include beginning construction of the city's metro and the reconstruction of the Vistula riverside boulevards and Old Town's barbican.



Starzyński was elected to a second four-year term on 18 December 1938, in democratic elections. He held his office until World War II broke out. During his mayoralty:

- Two million square kilometres of paved roads were built.
- Forty-four schools were opened.
- The National Museum was built.
- Two major parks were opened to the public (one of which is now a National Reserve).
- Construction of Warsaw Metro was started.

Executive summary

The Grow with Warsaw workshops were an initiative of the City of Warsaw. The series of meetings brought together the City of Warsaw and real estate investors. They looked at six topics in detail: urban revitalisation, mixed use, retail, public space, residential, and city centre strategies. This report details the conclusions of those meetings.

The Grow with Warsaw series of workshops concluded that the theme of better cooperation between the City of Warsaw and other stakeholders including private developers and investors would provide a strong foundation for growth in the city.

The benefits of this cooperation included ensuring that more key sites were identified to support private capital investment in urban revitalisation projects on municipal land, and working a partnership approach to ensure that funds were raised for infrastructure to support local projects for larger-scale regeneration areas. This type of cooperation could also encourage more private investment into public space.

Another theme running through the workshops was more transparency regarding potential municipal project opportunities and better information flows to support informed decision-making and reduce risk for private investment.

For example, the City could support investment through local development plans along metro and urban rail lines and give investors access to data such as public transport flows to support viability of mixed-use projects. The City could also create a centralised database of residential project applications to increase understanding of planning decisions.

To reduce risk for investors, projects around historic property could be introduced to the market through special-purpose vehicles (SPVs), and the same structures could be used for strategic projects to ensure continuity.

The workshops included discussion about ensuring accessible housing for all, such as the possibility to improve requirements for affordable housing in new building plans, and to look more closely at the format and appetite for housing for senior citizens.

For the retail sector, the workshop saw a need to move towards more pedestrianised shopping areas to redirect heavy traffic away from central Warsaw. The vitality and success of shopping streets could also be improved through more unified management in these areas.



1 Introduction



Grow with Warsaw was a series of workshop meetings between the City of Warsaw and real estate players held in 2018.

The goal of these workshops was to present Warsaw's spatial policy and to develop—through an open exchange of ideas with the key players in the real estate sector—proposals for systemic solutions to serve as guidance for the conditions and directions of spatial development for the City of Warsaw.

During the series, six key themes were selected for the discussion related to Warsaw's development. These are: urban revitalisation, mixed use, retail, public space, residential, and city centre strategies. This report reviews these themes and the outcomes of the discussions in Warsaw.

Grow with Warsaw was organised by the Architecture & Spatial Planning Department and the Economic Development Department of the City of Warsaw. The project partner was the Urban Land Institute Poland, which was responsible for the preparation of the content, organisation of the workshops, and moderation of discussions. In addition, the workshops had

a number of Knowledge Partners and a Legal Partner, which provided invaluable support throughout the process. The Knowledge Partners were BNP Paribas Real Estate, CBRE, Colliers International, Cushman & Wakefield, JLL, Knight Frank, and Savills. The Legal Partner was Dentons.

“We launched a series of workshop meetings for the industry under the title Grow with Warsaw, during which we discuss the current and future spatial policy of the city and the needs of the companies which not only would like to invest in Warsaw, but also are able to create resident-friendly spaces to become the city's showcase. We would like to use the experience and ideas of investors and to develop recommendations and systemic solutions for the city's retail strategy.”

— **Michał Olszewski**, Deputy Mayor of Warsaw

2 Overview of city strategies and competitiveness

To help put Warsaw's city challenges in context, this section reviews ULI's core understandings of city competitiveness, urban strategy, strategic planning, density, technology and innovation, and city investment readiness. These insights prepare us for consideration of six critical issues in Warsaw.

2.1 City competitiveness

In recent years, ULI has developed a framework for thinking about the competitiveness of cities that builds on work by international organisations such as the World Bank and the World Economic Forum.² Broader than the definition traditionally applied to companies and firms, this framework goes beyond conventional economic competitiveness considerations and is designed to encourage a robust consideration of the many factors that may influence why some cities are more competitive than others.

It takes into account a broad range of issues, including how cities and their metropolitan space are governed, how strategies and projects are implemented, how innovation can be accommodated, and how firms and talent can be incentivised to come and stay.

A competitive city is one that:

- Attracts a high share of mobile talent, capital, and business;
- Provides a favourable entrepreneurial, institutional, social, and technological framework and infrastructure platform for local firms; and
- Sustains these private, public, or mixed assets to achieve a long-term competitive advantage.

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. It also gives competitiveness a public purpose, highlighting the need for cities to accommodate the needs not just of residents but also of businesses, investors, anchor institutions, tourists, and students.

Starting from the basis, the framework assesses the competitiveness of cities according to 12 dimensions within four broad pillars (see figure 1).

Figure 1: Competitive city 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

Source: ULI (2017).

2.2 Urban strategy

City leaders are increasingly facing the pressures of balancing quality of life and sustainability with productivity and growth. This requires a shift towards a managed-growth model, which is leading to an enhanced focus on sustainable long-term development and quality of life as key indicators of city attractiveness and health.³

Features of more managed cities and metropolises include their ability to:

- Meet the needs resulting from new and sustained population growth.
- Recognise the long-term character of this growth and the need to plan flexibly and adopt a new planning pattern to ensure a resilient approach to city development including affordable housing.
- Grasp opportunities and compete in a globalised system of trade and investment and participate in sectors that are increasingly traded globally.
- Address investment deficits resulting from institutional weakness or a lack of coordination at the city, regional, state, or national level.
- Withstand and bounce back from shocks that result from vulnerability to events such as extreme weather, terrorism, public health epidemics, and civil unrest.

- Be adaptable to a change of circumstances or perceptions about existing patterns of development and use innovative approaches to new problems.

Managed growth is critical for cities to compete in an era of globalisation and achieve broader economic development goals. It presents new imperatives for cities to optimise their assets and leverage private investment for wider city goals, such as improving sustainability, growing entrepreneurship, creating critical mass in new subcentres, and increasing housing supply.⁴

2.3 City strategic planning

Strategic planning plays an essential role in the urban growth management process and the successful creation and capture of value. Planning plays a pivotal role in regulating urban land use and development, but also has a key “place-shaping” role in the built environment. For investors, planning is the main means to ensure that the market in which an investment is made remains stable. But the ability of planning to manage the components of the built and natural environments so that they work together properly is also at the heart of how developments can achieve efficiencies, cost-effectiveness, and added value.⁵ The ULI Warsaw density case study identified that the city lacked vision and a binding spatial plan due to segregated bottom activity taking place (see page 9)⁶.

Planning can be viewed as unnecessarily slow, restrictive, and costly.⁷ But there is a growing sense of the imperative to recognise the potential and benefits of joined-up planning to support sustainable physical and spatial change in cities. Collaboration between urban planners and real estate professionals is key, since interactions with real estate professionals can offer insight into the private sector’s approach to risk evaluation and mitigation.

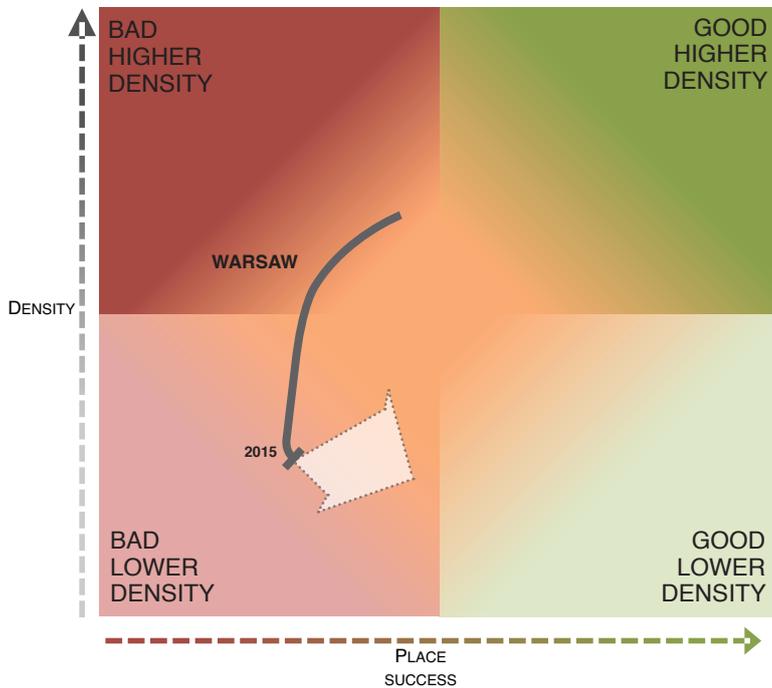
2.4 Intensification, densification, and mixed use

It is widely agreed that densifying cities can accommodate population growth within a contained environmental footprint, and that they enjoy better connectivity, amenities, open spaces, and social interaction as a result. A joint ULI/Centre for Liveable Cities report notes that the lower-density cities of the United States use about five times more energy per capita in gasoline than the cities of Europe, which are in turn about five times denser on average.⁸ ULI Europe produced three reports with case studies on density in 2015 and 2018.⁹ Dense cities, in principle, are able to become more productive and host innovation. It also makes the business case for transport and social infrastructure. Significantly, dense cities are also more investment-ready because of their ability to assemble and package large sites to institutional investors and other sources of capital.¹⁰ According to the ULI Warsaw density case study, the city would currently be categorised as having bad lower density (see figure 3 and case study).

Figure 2: Good and bad density.



Figure 3: Warsaw's journey towards better density.



Source: ULI (2015).

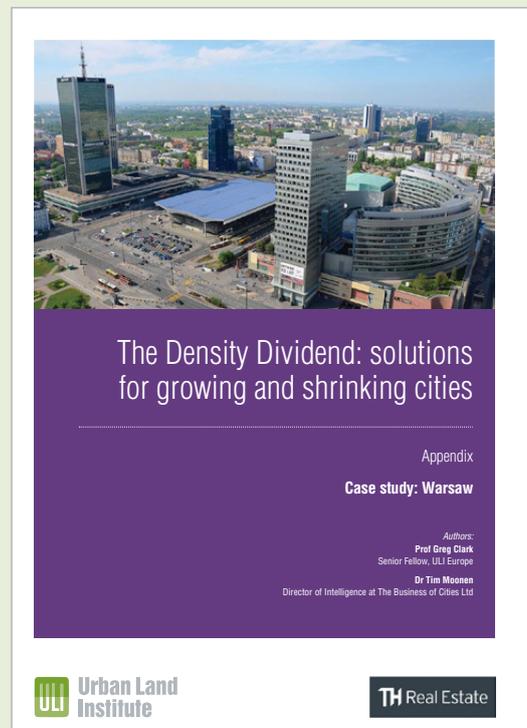
The Warsaw density case study¹¹

This case study explores the question of density and urban change in Warsaw. It identifies the key drivers, enablers, and attitudes to densification, and features a timeline of change.

Despite Warsaw being in a promising new cycle of re-urbanisation, the city needs density for this to be optimised. The city lacks a binding spatial plan, and many of its strategic areas are in effect unplanned. With a more co-ordinated plan for density, the city has the potential to grow to a city of 3 million people. The report recommends the following:

- A comprehensive spatial plan and better district planning to deliver density at a faster pace.
- A much more positive psychology of density rather than focused around towers.
- A metropolitan transit strategy.
- Dedicated development agencies.

Source: ULI (2015).



2.5 Technology, real estate, and urban development

The rise of high-tech industries is a disrupter across the spectrum. At the macro scale, the innovation economy is fuelling the demand to locate in cities. Cities are the 21st-century “laboratories” for commercial innovation and cross-fertilisation. Neighbourhoods are being rebuilt to serve innovation as part of a broader process of reurbanisation and redensification. And at the micro scale, many buildings in cities need to be repurposed to fit the needs of new occupiers. In short, the innovation economy has jump-started a revolution in real estate demand.

Meeting the new demands of the innovation economy (and increasingly of other sectors that are following its lead) presents challenges for the business models of real estate owners and landlords. As part of real estate’s shift towards providing stewardship, management, and services in addition to the raw asset, real estate is becoming more active to create a more supportive operating framework for innovation, for improving finance and access to capital, and for enhancing city and

district-wide attractiveness by managing housing, social infrastructure, and civic and public space.

2.6 An investment-ready city

For cities around the world, the sources and systems of investment in real estate, infrastructure, and other hard assets have changed quickly and dramatically. Risk and return structures, and the time frames and dynamics of investment cycles, have shifted. These changes require cities to become more focused on the conditions that will attract investment and on what constitutes an investment-ready city, defined by ULI Europe as:

“The demonstrated capacity of a city to prime itself towards the needs of external investors, by providing a credible and efficient framework and process for external investment, coupled with a development pipeline of bankable propositions and opportunities that meet the specific process, asset, scale, and risk management requirements of the investors.”¹²

More information on city competitiveness and the other issues addressed in this chapter can be found in the following ULI Europe publications:

- *The Case for Open Space: Why the Real Estate Industry Should Invest in Parks and Open Spaces* (2018)
- *Supporting Smart Urban Growth: Successful Investing in Density* (2018)
- ULI Europe, Competitiveness Reports, *Milan and Turin* (2018) *Brussels and Antwerp* (2017)
- *Density: drivers, dividends and debates* (2015)
- *The Density Dividend: solutions for growing and shrinking cities* (2015)
- *Technology, Real Estate, and the Innovation Economy* (2015)
- ULI Singapore and Centre for Liveable Cities. *Ten Principles for Liveable High Density Cities: Lessons from Singapore* (2013)
- ULI Europe (2014) *Business-Friendly and Investment-Ready Cities: City Government and the Local Business Growth and Investment Climate*.

3 Grow with Warsaw

The Grow with Warsaw series adopted six key themes for the discussion of Warsaw's development. These are as follows: urban revitalisation, mixed use, retail, public space, residential, and city centre strategies. In this section of the report, we review these and the outcomes of the discussions.

“In Warsaw, much of the urban regeneration is on former industrial lands. These are in limited supply. It was therefore important to plan their future use with the long-term needs of the city economy in mind rather than just current preferences. For example, whilst many such sites may be converted to residential, it is important to allocate some of them for future new industries. This will attract investors, create new jobs, and foster development.”

— **Jan Jakub Zombirt**, Associate Director, Strategic Consulting at JLL, one of the Knowledge Partners for the Grow with Warsaw project

3.1 Urban revitalisation

Urban revitalisation is often seen as a public/private partnership (PPP) endeavour that is successful only through collaborative leadership and a comprehensive visioning process. According to this increasingly popular model, the public sector provides planning, financial resources, or incentives, while the private sector contributes investment, expertise, end users, and an approach to market, promote, and animate the renewed place. City-wide revitalisation strategies, new planning policies and codes, designation of special revitalisation zones, and at times the creation of special revitalisation agencies that make the process their sole focus are all gaining in popularity as a result.

Debate in Warsaw

The debate focused on four key topics:

- i. How to accommodate industrial and logistics enterprises and how to prevent industrial lands from disappearing.
- ii. How to leverage urban revitalisation to make industrial brownfields useful for business again.
- iii. The role of prospective investors and urban revitalisation projects.
- iv. Where placemaking fits into the urban revitalisation process and how urban revitalisation projects can translate into increased real estate value.

During a discussion on Warsaw's urban revitalisation, **Wioleta Wojtczak, Associate and Head of Research** at Savills, one of the Knowledge Partners for the Grow with Warsaw workshop series, referred to the example of King's Cross in London. This is where a new part of the city was constructed on post-railway and post-industrial land, stretching across 27 hectares, through comprehensive urban revitalisation measures. ULI did a case study on King's Cross on funding urban regeneration.¹³



King's Cross is a mixed-use, urban regeneration project in central London that is also a major transport hub for the city.

“Placemaking has emerged in response to previous design trends that prioritised car traffic and transport.

Its objective is to empower local communities, engage neighbours in the shaping of shared spaces, improve health and well-being, and build neighbourly bonds.”

The Placemaking 2017 report by CBRE revealed that urban revitalisation projects led to a 33 per cent and 7 per cent growth, respectively, in the value of real estate located within 100 and 500 metres of the regenerated space.”

— **Magdalena Frątczak**, Senior Director and Head of Retail Agency at CBRE, one of the Knowledge Partners for the Grow with Warsaw project

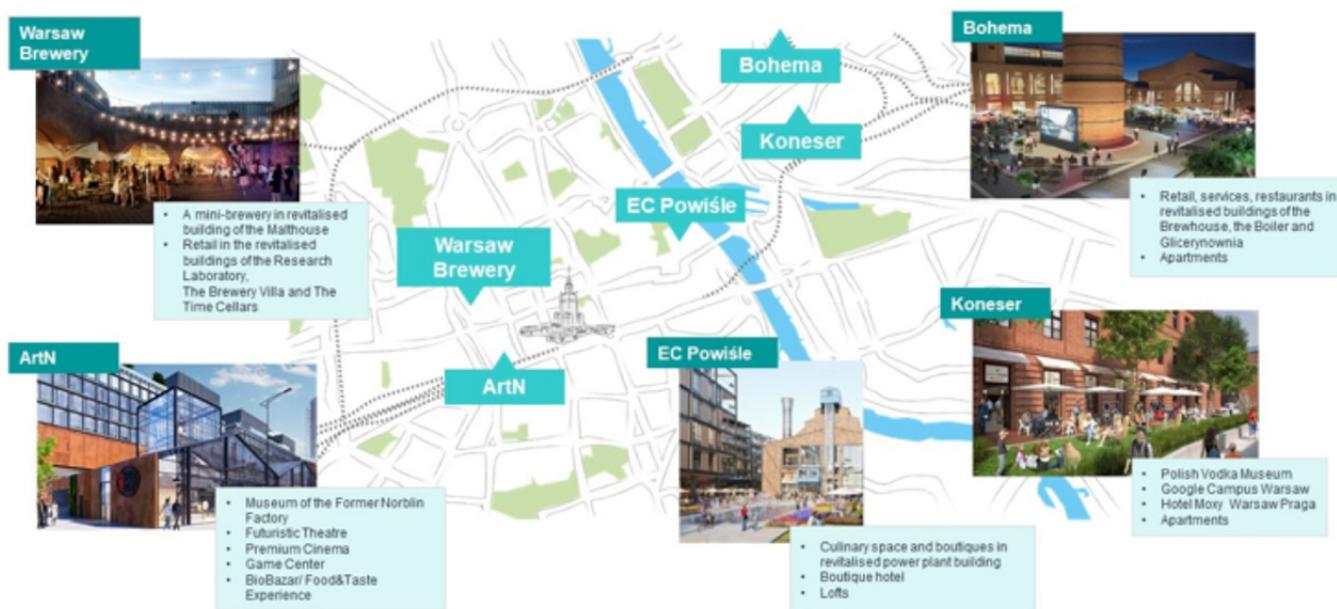
Conclusions

- The supply of valuable plots in the city has been shrinking, which makes developers more willing to implement urban revitalisation projects on municipal land. A model of cooperation between the city and private investors in regenerated areas should be developed, since the PPP model has not yet become popular.
- For PPP projects, effective cooperation with private investors can come only once the city has built confidence in the market in its role as a business partner.
- Plans should be developed in a more flexible manner, instead of assigning specific functions to specific stakeholders.
- When developing a vision for a wide regenerated area, municipal authorities should secure funds from the wide range of developers who have interest in the area, with the aim to create the local infrastructure necessary for such projects to arise.
- City authorities could impose requirements for affordable housing in new building plans. Such a solution has already been implemented in other countries, where consent is granted only on the basis that the developer will provide local community benefits.
- Special-purpose vehicles (SPVs) should be established for specific projects in the city, and investments should be independent of political parties, in order to avoid the risk of strategic decisions becoming dependent on political changes.
- Specific local development plans should be drawn up for locations along metro lines to give these areas new functions.
- A platform that brings together local activists and city leaders should be created in order to encourage discussion about which types of projects should be implemented and where.

“Urban revitalisation is not only about renovating historic monuments and erecting new buildings, but it also involves building a sense of unity between the local community, entrepreneurs, and the city. Without this unity, the entire urban revitalisation process is likely to fall through.”

— **Marlena Happach**, Director of the Architecture and Spatial Planning Department

ARE MIXED-USE PROJECTS THE WAY FOR THE REVIVAL OF THE SILENT PARTS OF THE CITY?



Mixed-use examples slide by Knight Frank, a Grow with Warsaw Knowledge Partner.

3.2 Mixed use

In recent years, important drivers of urban change have fuelled a renewed drive for mixed-use developments. Technology is changing the nature of work, retail, and entertainment, giving rise to the need for both greater quality and flexibility in the use of built space. Urban population growth and climate change have triggered a new focus in planning on dense urban spaces to avoid sprawl and pollution. Finally, shifts in transport modes and the growth of active mobility call for mixed-use development as a means to provide greater scale and integrate activities efficiently.

Debate in Warsaw

The debate focused on:

- The legal aspects of the development of commercial real estate projects.
- Mixed use as a way to wake up or enliven the “dormant” parts of the city.
- Consultation processes for residents on mixed-use projects.
- The new expectations of office workers.

- Transport and the city’s workplace policy.
- The new forms of co-operation that are changing the city.
- Modern work space as an urban planning challenge for Warsaw.

A key part of the discussion centred on the city’s new Warsaw 2030 strategy. Based on three pillars—active residents, a friendly place, and an open metropolis—the goals of the policy are to enable a responsible community, convenient locality, functional space, and innovative environment.

Piotr Sawicki, Acting Director of Economic Development for the City of Warsaw, mentioned the city’s plans to amend its spatial-planning policy by drafting new conditions and directions of spatial planning. “What we want is to create a ‘city of short distances’ with multiple uses available side by side. Today, multifunctional projects are not given priority treatment. We want to change that.”

One suggestion was to set up the post of city project coordinator. The coordinator would not be there to replace official bodies, but to act on the city’s behalf as a project manager having faster access to the necessary information in each department and mediating in the dialogue between the city’s authorities, thus making the whole process more effective and less costly. “The current lack of coordination leads to delayed decisions for investors,” explained Piotr Staniszewski, a Partner at Dentons, a Legal Partner of the Grow with Warsaw workshop series.

Deputy Mayor Olszewski concluded the discussion by saying that he believes there is room for co-operation but stressed that the city does not compete with developers in the office space market and will not do so, since the provision of office and other function spaces for rent is not one of its core tasks.

Conclusions

- The City of Warsaw should designate a project coordinator for large, multifunctional development projects.
- Development plans should be more flexible and allow for changes to the functions of buildings.
- Provisions should be made that enable investors to access data and analyses of public transport passenger flows.
- The parking space policy should be amended so as not to allow new spaces in the city centre and to discourage individuals from travelling by car to the city centre.
- Select real properties for revitalisation aimed at transforming them into multifunctional coworking spaces.
- Collect and make data available by the city, thus shaping space rental policies concerning main streets.

3.3 Retail

The growth of online retail has led to a revolution in consumer behaviour, and a major loss of market share in retail purchases at brick-and-mortar retailers. To meet the digital challenge, innovative retailers have been adopting new omni-channel strategies to reposition themselves and their stores as part of an experience economy in which superb customer service is combined with memberships, rewards, and hospitality.

Retail real estate providers, meanwhile, are creating new strategies. Out-of-town shopping malls, supermarkets that compete with high streets and independent retailers, and new retail districts that compete with established locations are increasingly seen as detrimental to urban vitality and vibrancy. Such retail formats are car-dependent, undermine a common urban fabric, and add to poor air quality, carbon emissions, congestion, and sprawl. As a result, they are being replaced by strategies focusing on high-visibility premium locations in major destination cities, the co-location of retail with transport termini, and the reintegration and revitalisation of the traditional mixed-use high street.

City centre-based retail has therefore been an important ingredient in the revitalisation and redensification of cities. Retail real estate

investors, developers, and operators have become some of the most innovative leaders of urban revitalisation, placing retail at the heart of new mixed-use urban districts that combine commercial, residential, services, and entertainment areas in vibrant locations.

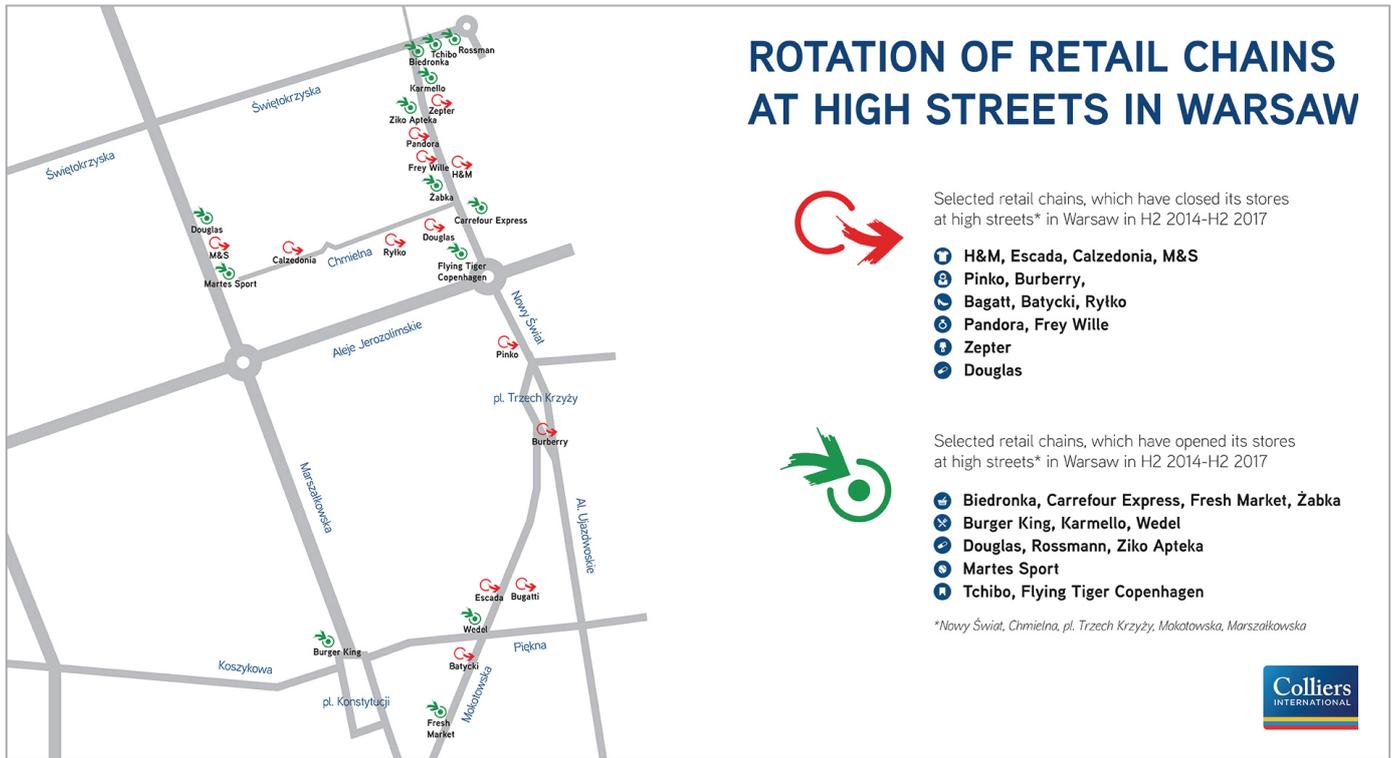
Debate in Warsaw

The key themes of the discussion were as follows:

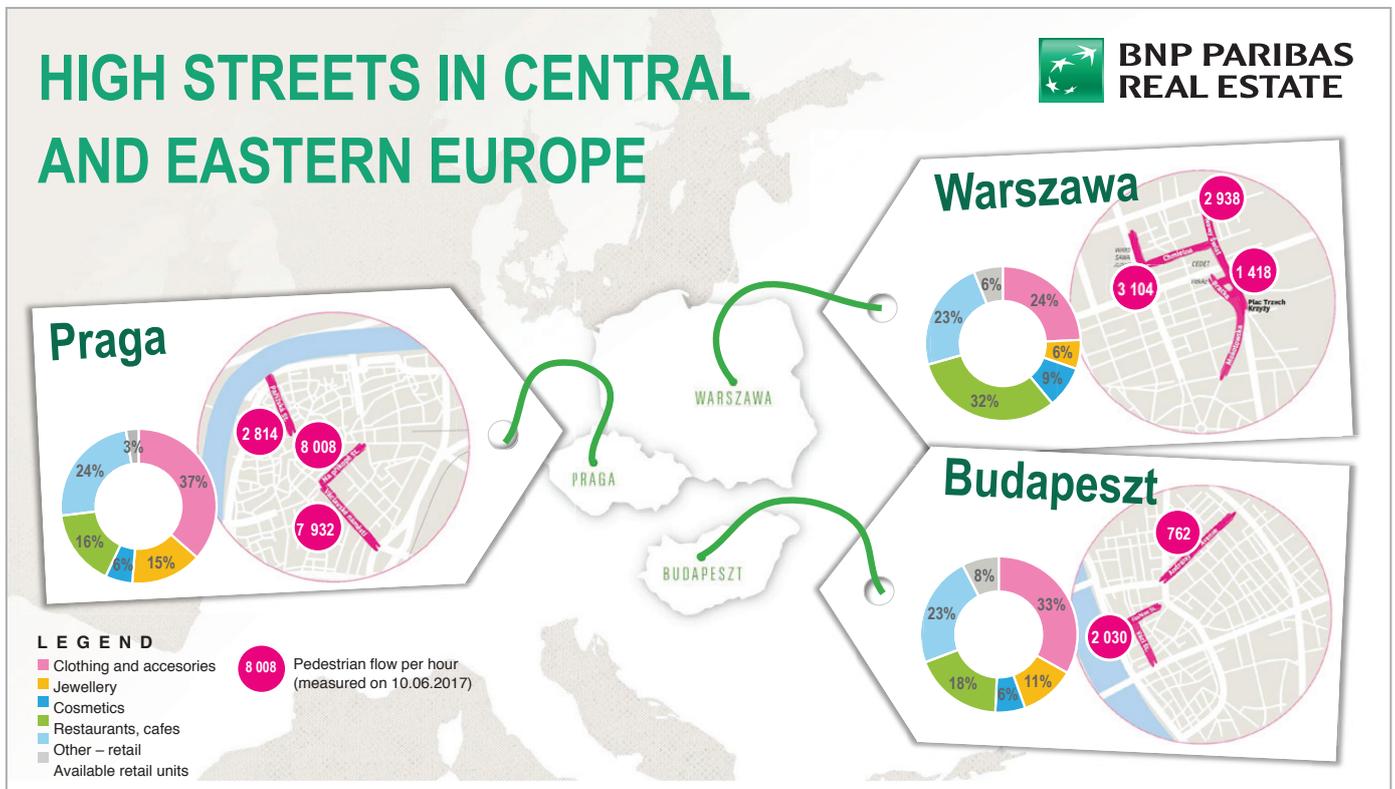
- i. How to attract major brands back to Warsaw's shopping streets.
- ii. How to increase pedestrian traffic on shopping streets in Warsaw.
- iii. The need to address the ownership structure of real estate units and the management of shopping streets.
- iv. Mixed-use developments in shopping streets as investment products.
- v. The role of public transport in enhancing the accessibility of shopping centres.
- vi. The relationship between retail and transport and how to ensure that the right amount of parking spaces is available in shopping centres.
- vii. E-mobility in Warsaw.

“Today, investors and developers are changing the city. They are aware that retail now is not just about sales but about the experience. This should be taken into account in retail planning in cities.”

— **John Banka**, the former chair of the ULI Poland. Banka showed retail solutions in other cities such as Vienna, Barcelona, Toronto, and Miami.



Retail chains along high streets in Warsaw slide by Colliers International, a Grow with Warsaw Knowledge Partner.



High streets in Central and Eastern Europe slide by BNP Paribas Real Estate, a Grow with Warsaw Knowledge Partner.



Grzegorz Okoński, Director of the Housing Policy Department of the City of Warsaw, also highlighted the need for mixed-use projects to develop vitality in the central areas of the city to include not only offices (as it currently stands) but also retail, culture, and housing.

Conclusions

- There is a need to direct heavy car traffic away from the centre of Warsaw (Marszałkowska Street, Aleje Jerozolimskie Avenue) as well as to restrict car traffic in order to build new pedestrian precincts—e.g., along Aleje Jerozolimskie Avenue towards the Central Railway Station. Some other European cities, such as Copenhagen, Stockholm, Berlin, and Vienna, have already had success in this regard.
- Shopping streets should be managed in a similar way to shopping malls, in that tenants should be warned about adjoining developments and should be provided with the same benefits as those offered in shopping malls.
- Lease agreements should be on a multiyear basis rather than just three years. The current legal status of city-owned properties essentially prevents any investment in them (even a 10-year tenancy agreement is too short for most investors).
- Development plans and strategies should not impose surface area limitations, such as the 1,000-square-metre limit on Defilad Square.
- The heritage conservation officer could loosen old-building renovations rules. In many cities worldwide, protection now concerns only building facades and shop windows.
- A reprivatisation law should be passed to help resolve property ownership issues.

3.4 Public space

In recent years, major trends are driving a renewed interest in public space. These include:

- The reurbanisation of population and business, which is giving rise to more intense use of built space and increasing demand for public space where people can “decompress.”
- Changes in socialising, retail, and entertainment that drive a premium on well-designed and curated spaces that foster unique interactions.
- Increases in awareness of the health dimensions of urban living, which is driving a new agenda of pedestrianisation and healthy streets.
- The needs of new innovation sectors for high levels of interaction and proximity.
- Affordability concerns that are driving citizen space activism and free-of-charge public events as a means to animate otherwise unused spaces.

But whilst public space is back on the agenda in many cities around the world, achieving an optimal approach to public space continues to raise several key issues and questions. These can be identified as follows:

- **The amount and location of public space.** This involves assessing not just actual demand, but also the latent demand that might exist if the space was attractive and well managed.
- **Public space financing.** ULI’s reviews of public space in cities have shown that whilst local governments recognise the value of such space to their citizens, it is difficult for them to generate resources from public space so that it becomes financially sustainable. This leads to such space being locked in a low-investment/low-performance equilibrium.

- **Performance and use of space.** How to build the image and identity of spaces, develop a diverse community of users, and increase the mix and range of amenities and activities offered are all becoming important questions.
- **The role of the private sector in the delivery of public space.** Many private-sector stakeholders are willing to contribute

to public spaces because it is in line with their wider strategies. This has led to the idea of “semi-public” or “privately owned and/or managed public space.” There can, however, be tensions between the goals of the private sector to protect and manage such space carefully and the objective of the public authorities to ensure that it is open and available to all.

The Case for Open Space: Why the Real Estate Industry Should Invest in Parks and Open Spaces¹⁴

This 2018 ULI publication outlines four compelling cases for developers to invest in open space. Each case is supported by research and project briefs, as well as insights from developers, public officials, and others working at the intersection of open space and real estate development.



The case for developer-supported open spaces:

1. By investing in equitable access to parks and open space, developers can help **improve community health and wellness, boost economic development, and enhance a project’s financial success.**
2. Developer-supported parks and open spaces can **help mitigate** the impact of insufficient public resources for parks, thereby providing communities with **access to beneficial open space while enhancing long-term real estate value.**
3. Community-driven programming supported by the private sector can **activate open spaces, foster social interaction,** and strengthen the overall **value** and **marketability** of associated projects.
4. Creating or funding parks and open spaces can help developers secure **community buy-in, public sector support,** and valuable **zoning incentives** in communities where these incentives are available.

“It is worthwhile for Warsaw to have as many public spaces as possible, since they are the guarantors of the city’s existence. Such places should be created and then animated and managed so that they generate income and improve their attractiveness.”

— **Karolina Kaim**, member of the Executive Committee of ULI Poland

Debate in Warsaw

A discussion on the public space and green infrastructure in the city covered six key topics:

- i. How the city can best encourage investors to participate in the creation of public spaces.
- ii. The extent to which public space could be created and managed as a commercial facility.
- iii. Collaboration amongst city, investors, and asset managers.
- iv. How to progress from green buildings to green cities.
- v. What constitutes the key components of a successful business district.
- vi. The importance of placemaking more broadly.

Conclusions

- Good public spaces need private sponsors (ideally public/private activities and funds; private investors also influence the city’s brand).
- As regards to the financing of the construction and maintenance of public spaces in the city, the systemic solutions (taxes, grants, sponsorships, and public/private partnerships) should be encouraged.
- The creation or revitalisation of public space should be integrated in broader urban regeneration/(re)development projects, including densification and mixed-use projects, which help make the business case for the necessary investment.
- The city should encourage private companies to invest in public spaces and green infrastructure (e.g., by creating an attractive model for cooperation to investors or by introducing exemptions or tax cuts for companies investing in public spaces).
- Locations in Warsaw that are ready for development in public spaces include the following: Teatralny Square, the surroundings of Warszawa Centralna Station, Defilad Square, Zbawiciela Square, Trzech Krzyży Square, and the space immediately in front of the Warsaw School of Economics.



Millennium Park, a new flagship public park in Chicago.

“New office projects should integrate the city’s areas and create new public grounds, rather than divide them. More and more developers, without any official direction, are planning to incorporate public areas into their projects. These include places such as terraces, squares, parks, and passages open not only to office users, but also to residents.”

— **Katarzyna Kotkowska**, Associate at Cushman & Wakefield, one of the Knowledge Partners for the Grow with Warsaw project



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3.5 Residential

Hosting a residential population is a key function of all cities. For the basic links between the urban population, jobs and the economy, and amenities and services to work, a city needs an effective housing market.

In cities in Central and Eastern Europe (CEE) that were previously under the Soviet regime, there is a prevalence of medium-density, low-design Soviet-era bloc housing. Today, the quality of these estates varies considerably, since many of them were privatised in the 1990s, leading to fragmented ownership patterns and a reduced scope for collective action and investment in shared services and amenities.

In CEE cities, this bloc housing is often now viewed as unattractive by its original (now aspiring) occupants, and has been turned over to short- and longer-term private lets, and, in some cases, sublets. The presence of this large number of low-cost rental properties within such cities represents a key characteristic in the evolution of their housing markets. On one hand, it means that there is an abundant and affordable tier within the city's housing market where newcomers and low-budget visitors can afford to start or stay. On the other hand, it means that the development of other forms of rental properties may be constrained by the existence of this large-scale and cheaper alternative.

Debate in Warsaw

The debate on residential development in Warsaw centred on seven key topics:

- i. Building new housing estates following the introduction of the new housing law. This law aims to accelerate and simplify building and planning procedures in homebuilding.
- ii. The role of guidelines and local urban standards.
- iii. The need to coordinate the work of officials from different city government departments in order to streamline the initial construction process.
- iv. The consequences of urban sprawl.
- v. The construction and standard of student housing blocs in Warsaw and the need to prioritise buildings that will offer more than just typical residential facilities.
- vi. The need to build senior-friendly flats.
- vii. The need to build flats in Warsaw under public/private partnership models.

Piotr Staniszewski, Partner at Dentons, the Legal Partner for the Grow with Warsaw workshop series, emphasised that the whole process—from filing an application to issuing a permit for the construction of a housing project—is too complicated and long. Many permits and approvals are required, and those formalities are often significantly prolonged.

According to experts from Dentons, the potential solutions include the following:

- Reducing the waiting time for decisions and arrangements required for permits through efficient proceedings, especially for those where there are conflicting interests.
- Improving the consistency of the obtained approvals.
- Adopting local plans, and updates of the study, in particular for transport and parking parameters.

Marek Goluch, Deputy Director of the Housing Policy Department of the City of Warsaw, noted that PPP is an opportunity, but also a challenge. Warsaw is having difficulties finding partners to increase the supply of publicly owned affordable housing. According to Goluch, the city should look for a major financial investor who would be encouraged to cooperate with the city by having a multiyear agreement. However, he noted that there are currently no private entrepreneurs in Poland ready to undertake and manage municipal flats over the long term.

David Brodersen, a member of the Executive Committee of ULI Poland, spoke about the cooperation between cities in Western Europe and private investors in the housing market. He showed how Warsaw could be inspired by the projects of cities such as Leipzig (flat demolition and reconstruction) and Luxembourg (transit-oriented development) when it comes to creating joint housing projects with private partners. It is forecast that Warsaw will see an increase in young residents, migrants, and the elderly.

“All these phenomena should be taken into account when planning the development of the city, including investment in housing.”

— **David Brodersen**, a member of the Executive Committee of ULI Poland

Marlena Happach, Director of the Architecture and Spatial Planning

Department, City Architect, then discussed Local Urban Standards as Warsaw's response to the introduction of the new housing law nicknamed "lex developer." Investors were particularly interested in the subject of local urban standards as Warsaw's response to the special law.

"The most difficult applications will be those that contradict local plans but wanting to take advantage of the special law, . . . but the city will guarantee good standards, conducive to the healthy development of the city."

— **Marlena Happach**, Director of the Architecture and Spatial Planning Department, City Architect

Conclusions

- The city, by means of an SPV, should prepare a selected historic property and introduce it to the market. This would constitute one "investor safe" way of gauging market appetite for a given project, without investors being exposed to unquantifiable risks.
- Development contributions—reserves of funds in a given development budget for public investments—should be instituted in accordance with city guidelines.
- A centralised database of project applications and their reasons for failing should be created by City Hall. A database of student housing construction projects also should be created.
- Commercial land in Służewiec should be altered to allow the construction of "aparthotels" and other multipurpose buildings with a predominantly residential function.
- A proportion of allotment gardens should be transferred from the most populated districts of the city (e.g., Mokotów and Praga-Południe). This would free up land and put downward pressure on land prices, and thus on flats, therefore preventing the negative effects of urban sprawl.
- There is a need to encourage investors to revitalise the city. This can be achieved through discounts, tax reductions, support programmes, and the simplification of procedures related to conservation.
- The needs of senior citizens in Warsaw, and their appetite to move to senior citizens' homes, should be more closely examined.

3.6 City centre strategies

In the current era, city centres are facing a series of opportunities and challenges that require proactive strategies. These include the following:

- Increased population living in city centres, which supports urban economies, and destination development changes the activities, amenities, and services required in city centres compared with their traditional roles as business and administrative centres.
- Agglomeration of jobs in city centres in new service and knowledge economy sectors, often in new and specialised districts.
- Major changes in working patterns (e.g., flexi-working and coworking).
- The changing role of city centres as destinations, such as in new retail formulas, and the rapid growth of urban entertainment and urban tourism.
- The growth of universities and knowledge institutions in city centres, and the rise of support for students and researchers as a new city centre function.
- An imperative to reduce the carbon intensity of city centres and to increase air quality, reduce heat island effects, and improve health.

There is therefore often a need for three interlocking approaches as part of a combined strategy:

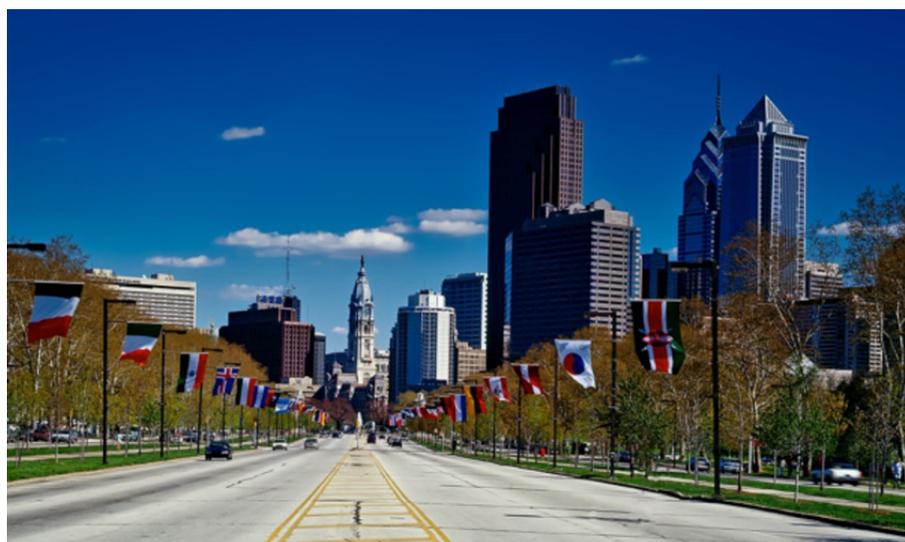
1. A city centre vision that is owned and championed by multiple stakeholders and can be translated into planning policies and partnership activities. This is usually the result of a forward-looking process of engagement between multiple stakeholders, and may identify key themes or catalytic projects for change.
2. City centre operational management and enhancement including capacity increases and “smart city” applications, usually involving the development of a city centre management board or business improvement district (BID). A BID is a defined area within which businesses are required to pay an additional tax (or levy) in order to fund projects and/or management within the district’s geographical boundaries.
3. Identification of opportunities and strategies to optimise particular locations, buildings, and systems.

A successful 25-year-plus regeneration strategy in Philadelphia was led by a globally renowned business improvement district.

Debate in Warsaw

The concluding workshop of the series was opened by **Michał Olszewski**, Deputy Mayor of Warsaw, who described the value of the takeaways from the Grow with Warsaw meeting for the future of the city.

Dorota Wysokińska-Kuzdra, Chair of ULI Poland, stressed the importance of an open dialogue between Warsaw authorities and investors, developers, other market participants, and the real estate industry.



A successful 25-year-plus regeneration strategy in Philadelphia was led by a globally renowned business improvement district.

Key debate topics revolved around one of the key areas in the city centre around the Palace of Culture and Science (PKiN) and its surroundings:

- i. The mechanisms to encourage investors to implement the concept of development of the Palace of Culture and Science (PKiN) and environs; and the action plan to be developed for the area (e.g., the idea of an underground city below the PKiN area).
- ii. The potential for residential buildings around the PKiN, including affordable housing.
- iii. The commercial development of areas around the PKiN, and the potential for trade and office space.
- iv. The significance of the PKiN's surroundings for tourism.
- v. The importance of public space around the PKiN.

“Meetings within Grow with Warsaw are extremely valuable to us. When planning the new centre of Warsaw, we want to take advantage of the experience of other cities, both Polish and international.”

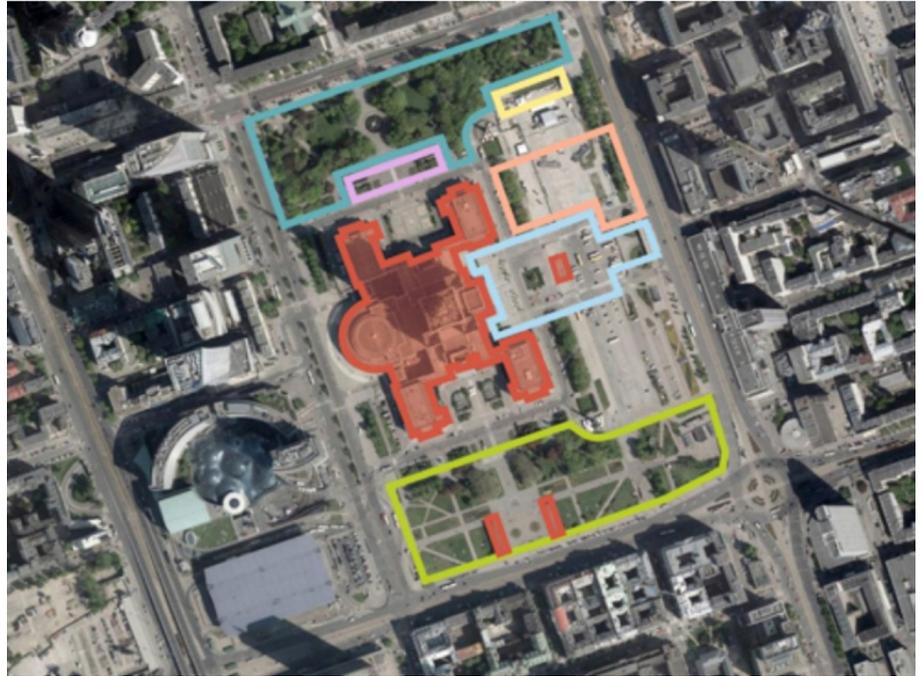
— **Michał Olszewski**, Deputy Mayor of Warsaw

The opportunities for the Palace of Culture and Science

During the workshop, Marlena Happach, Director of the Architecture and Spatial Planning Department, City Architect, spoke about the changes under consideration in the centre of Warsaw.

She discussed the opportunities for local spatial development plans for the PKiN area. “Only by compiling the old with the new, adding new functions and ideas can we get an area of a healthy, multifunctional city.”

Development activities in Plac Defilad, the main plaza in the area, have been prevented over time by issues with ownership rules, demolition restrictions, reprivatization, vagueness of the relevant law, and negotiations with the Polish State Railways (PKP). Instead of trying to build a comprehensive development approach, the city is taking small steps to implement temporary solutions—including green space, bicycle lanes, and changes in pedestrian paths. New public spaces (Central Square), buildings (Museum of Modern Art, TR Warszawa theatre), and reconstruction projects (Emilia pavilion) are popping up to regenerate the neighbourhood and attract residents and visitors alike.



Map of Palace of Culture and Science (PKiN) and Plac Defilad. Source: City of Warsaw (2019).

Conclusions

- A flexible study and local plans should be prepared to allow real estate owners to adapt to market changes. This will overcome the current level of rigidity that maintains given functions even in areas planned up to a decade ago.
- Plac Defilad should be considered in its entirety and a new vision should be created for the entire space.
- Plac Defilad should contain places where pedestrians, residents, and tourists can spend time (e.g., cafés, restaurants, and meeting places with events). Car parking should be moved underground.
- A website for Plac Defilad that contains all information of interest to potential investors should be created.
- The possibility of the city creating SPV to manage the investment process of Plac Defilad, bringing together the largest real estate owners, should be carefully considered.
- Entities with claims in investment plans should be consulted and included in all plans. This may entail estimating the value of their current claims and their possible satisfaction from the future profits of the development project.

4 Summary of recommendations and next steps for Warsaw

Figure 4: City 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

Source: ULI (2017).

4.1 A way forward for Warsaw

For cities that embrace a “managed metropolis” approach, there is the promise of improved tools to promote urban development and attract property investment. Broader outcomes from across the Warsaw workshops can also be reviewed using aspects of the city competitiveness framework (see above):

Governance framework

- There is a clear commitment to move towards more strategic and integrated longer-term development planning of the city. This will be important to guide long-term investment and optimal value creation for citizens, private investors, and developers.
- The Grow with Warsaw process has recognised the important role of transport investment in shaping city development and real estate investment. The workshops highlighted the need for further vision and leadership from the local authority. This included coordinating funding from developers for regeneration to create the local infrastructure, as well as providing specific project coordination for large multifunctional development projects.
- The City could also support density and mixed use by imposing or amending planning guidance such as requirements for affordable housing and being flexible about changes of functions for buildings or new uses such as aparthotels and other multipurpose buildings with a predominantly residential function.
- The opportunity to participate in value-capture financing techniques such as tax increment financing (TIF), planning gain supplements, local taxation, or development levies can help local governments leverage their assets in innovative ways, enabling developments that may not be possible under a system of handouts from higher tiers of government. For Warsaw, this is an important future agenda to put developer and investor contributions into a more systematised approach that captures value when it occurs, rather than inhibiting investment with payments in advance.

Competitive climate

- Through the Grow with Warsaw process, there is the proposal to create a capable interface between the city government and the investment community to speed up processes and partnerships.
- In working with private investors, the City could support interest through amendments to regulatory or tax environments. For example, SPVs to find an “investor safe” way of gauging market appetite for the management and development of historic buildings and sites, or tax cuts for companies investing in public spaces.

Agglomeration

- Better institutional engagement can support the development of the city, particularly for urban revitalisation projects on municipal land. This could be achieved by building a model of cooperation between the city and private investors in regenerated areas and leveraging ideas such as the PPP model.

Attractiveness to talent

- The branding, identity, and liveability of the city could be addressed through the revitalisation of the retail area by reducing traffic in the centre of Warsaw in order to build new pedestrian precincts. The success of these areas could also be supported by better management of the retail districts.
- The quality of the public spaces also supports the brand of a city, and bringing more private investment into this area would be a positive step.
- The revitalisation of Plac Defilad as a place for pedestrians, residents, and tourists would also provide an additional focal point for the city.
- The city could also innovate to attract a different range of companies by transforming properties into multifunctional coworking spaces.

These recommended ways forward can help the City of Warsaw become a more competent partner for real estate developers, and to become more “bankable” and “investment-ready.” The types of progress that Warsaw can achieve by using enhanced powers may include the following:

- Densification of land/increased brownfield development;
- Promotion of polycentric land use patterns;
- Promotion of more mixed-use development;
- Reform of planning policy/design codes;
- Infrastructure expansion to support development of new nodes; and
- Development of long-term strategic city development plans.

The achievements of the Grow with Warsaw series

The Grow with Warsaw series has an important role in the future planning and development of the City of Warsaw. It has raised critical issues, identified opportunities, and promoted a new dialogue between the city and the investor/developer community. Warsaw operates in a highly competitive landscape for investment where investors chose between multiple cities and locations to allocate capital and seize opportunities.

Piotr Sawicki, Acting Director of the Economic Development Department of the City of Warsaw (EDD), in a summary of the Grow with Warsaw workshop series assured the group that he had taken specific actions to facilitate the formal preparation of the investment process for investors.

The director refers to a pilot programme on a selected part of the revitalised area of Praga Północ to create a new commercial area.

Sawicki's statement was that mayoral regulations relating to the legal sublease of city-owned premises within revitalised areas have already come into force, paving the way for more activity in revitalised areas. Plans to extend this city-wide are currently under consideration. There was confirmation that the city is ready to enter into joint ventures with private partners on its plots, for example, in the following streets: Szwedzka-Stalowa; in the quarter with the Różycki bazaar; in the surroundings of the National Stadium; and in the Warsaw Social District in Wola or in Hala Gwardii. "These five locations alone provide possibilities to build approximately 550,000 square metres of usable space for various purposes," said Sawicki.

The city government has declared openness to various cooperation tools—for example, investments in public/private partnerships (in the form of tenders, negotiations, competitive

"EDD will form a team that will support investors and lead them through the administrative path, as it is already happening in other cities. Each supported project should have its own official manager."

"The first market studies have already been prepared. The JLL study identifies those areas in the heart of the city that should be developed first. At the same time, E&Y developed a study on trade in the revitalised area in Praga Północ. We would like to support local business when it comes to trade development. We are ready to run a pilot programme on a selected part of the street in order to create a new dynamic commercial area. In autumn 2019, we are planning a conference on the strategy for the development and management of shopping streets so that they can become a catalyst for space changes in the centre of Warsaw."

— **Piotr Sawicki**, Acting Director of the Economic Development Department of the City of Warsaw (EDD)

dialogue, etc.), concessions, activities through joint ventures, and SPV companies. Tools of cooperation successfully applied abroad (e.g., land value capture or requests for proposals) also will be analysed.

Much of the ensuing discussion centred on the pilot projects aimed at creating fully developed shopping streets in the city centre.

Jan Jakub Zombirt, Director of JLL's Strategic Advisory Department, cited the immense public support for giving priority to three groups of users: pedestrians, cyclists, and public transport users in the organisation of traffic at Marszałkowska Street. He stated that:

"It seems that the inhabitants of Warsaw are ready for profound changes in the space of the city centre."

The final part of the discussion on achievements to date looked to the ingredients necessary for scaling this pilot project. It highlighted the importance of:

- Encouraging private owners to cooperate with one another.
- Ensuring that marketing activities are used to create a coherent image of the area as a commercial district.
- Defining an action plan and timetable that enlist the cooperation of city government, residents, and private owners.

5 Conclusion

Grow with Warsaw creates the opportunity for a fresh start for the city. Set in the context of a growing population and new drivers for economic development and quality of life, Grow with Warsaw invites the city to reclaim its former ambition that sees the city itself as a project for great vision and joint endeavour. It positions Warsaw as a city that once again wants to plan for a great future, building upon and renewing the legacy of Stefan Starzyński, mayor of Warsaw from 1934 to 1939. This is a time for bold planning and effective reforms that bring Warsaw to life.



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