



Urban Land
Institute
Poland



ULI POLAND CONFERENCE

Shaping investments for next generations

21-22 May 2019 | Raffles Europejski Hotel, Warsaw, Poland

poland.uli.org



The Urban Land Institute is a global, member-driven organisation comprising more than 40,000 real estate and urban development professionals dedicated to advancing the Institute's mission of providing leadership in the responsible use of land and creating and sustaining thriving communities worldwide. ULI's interdisciplinary membership represents all aspects of the industry, including developers, property owners, investors, architects, urban planners, public officials, real estate brokers, appraisers, attorneys, engineers, financiers, and academics. Established in 1936, the Institute has a presence in the Americas, Europe, and Asia Pacific regions, with members in over 80 countries.

Welcome

Welcome to the ULI Poland Annual Conference. We are pleased to host you together with a great line-up of prominent international experts and industry influencers to discuss the way in which innovation and demographic changes are affecting cities, urban development, and real estate across Europe. We invite you to join the conversation, share your experience, challenge conventional assumptions, and most of all enjoy the event.

Dorota Wysokinska-Kuzdra
ULI Poland Chair

Thanks

ULI Poland extends its gratitude to the speakers, committee members and generous supporters who have made this event possible.

ULI Poland Executive Comitee

Dorota Wysokinska-Kuzdra
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Belong to a community committed to exchanging ideas, experiences, and sharing best practices in an atmosphere of trust and open sharing. More information: uli.org/join or contact europemembership@uli.org. or Malgorzata Poreba, ULI Poland National Council Coordiantor malgorzata.poreba@uli.org

Conference Programme

21 May 2019

Kick-off to Product Councils: 3 thematic groups

GROUP 1

URBAN SUPPLY CHAIN - RETAIL & LOGISTICS

Host: Kulczyk Silverstein Properties
Location: **Ethos**

GROUP 2

URBAN REVITALISATION & PLACEMAKING

Host: Skanska Property Poland
Location: **Spark**

GROUP 3

URBAN LIVING & VARIOUS FORMS OF RESI

Host: Echo Investment
Location: **Browary Warszawskie**

12:00 **Networking lunch** (at various locations for each thematic group)



13:00-15:00 **Kick-off to Product Councils: 3 thematic groups** (Members only)

Moderated by ULI Poland Executive Committee members :

Soren Olsen
Cushman & Wakefield

Marcin Klammer
BNP Paribas Real Estate

Karolina Kaim, Tacit Investment
Konrad Płochocki, PZFD

John Banka
Project Partners International

Tomasz Aleszczyk
Kulczyk Silverstein Properties

Paweł Szejter, JLL

Presentation by:

Marta Machus-Burek
Director Retail Strategies at Colliers International

Monika Laudenska-Sobik
Director, Benoy;
Chair of ULI Europe Sustainability Council

Xavier Jongen
MD Catella European Residential
Chair of the ULI Europe Residential Product Council

Karol Bartos
Group Head of Asset Management
Atrium European Real Estate

Sebastian Junghaenel
Co-Founder and Managing Director
Zeitgeist Asset Management

Marcus Cieleback
Group Head of Research
Patrizia Immobilien AG

Bartosz Mierzwia
Managing Director, CEE
Logicor

Magdalena Bartkiewicz-Podoba
General Manager
Liebrecht & wood Poland

19:30 - 22:00 **ULI POLAND CONFERENCE DINNER - Raffles Europejski Hotel**
(open to all registered participants)



Keynote: **Mikael Krogerus & Roman Tschäppeler**

Authors of "The Decision Book: 50 Models for Strategic Thinking"



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Raffles Europejski Hotel

9:00 Registration and networking coffee



9:30 Welcome and introductions

Dorota Wysokinska-Kuzdra, ULI Poland Chair - Warsaw

Conference Moderator: Andrea Carpenter, Women Talk Real Estate - London

9:40 Keynote presentation:
How innovation is reshaping Europe's urban environment

Guy Perry, Vice President, Urban Planning and Design, McKinsey & Company - Dubai

10:10 Keynote presentation:
Generational demographics affect all land uses

Simon Kuper, Financial Times columnist - London, Paris

10:40 Joint Q&A

Guy Perry, Vice President, Urban Planning and Design, McKinsey & Company - Dubai

Simon Kuper, Financial Times columnist - London, Paris

Moderator: Andrea Carpenter, Women Talk Real Estate - London

Conference Programme

22 May 2019

10:55 Panel discussion of young people: What makes the city alive and attractive?

High school student – Kosma Gaszynski, 2. Społeczne
LO im. Pawła Jasienicy

University student - Bernard Zakrzewski, University
of Warsaw

University student - Izabela Galinska, Real Estate Club
SGH

Young professional - Michał Toporowski, Cushman
& Wakefield

Young professional - Aleksandra Damaziak, Colliers
International

Moderator: Wojciech Ławniczak, Very Human
Services - Poznan

12:55 InfoBurst: Grow with Warsaw final report

Andrea Carpenter, Women Talk Real Estate - London

13:10 Presentation followed by a panel discussion: Capital markets & Investment. Investing late in the cycle. Is it all about beds & sheds?

Piotr Bielski, Director of the Economic Analysis
Department, Santander Bank Polska - Warsaw

Panel discussion:

Marcus Cieleback, Group Head of Research, Patrizia
Immobilien AG - Munich

Karol Bartos, Group Head of Asset Management,
Atrium Real Estate - Warsaw

Bartek Mierzwia, Managing Director CEE, Logikor -
Warsaw

Martin Polak, Managing Director, Regional Head CEE,
Prologis - Prague

Moderator: Soren Rodian Olsen, Partner, Head
of Capital Markets, Cushman & Wakefield - Warsaw

13:55 Closing keynote: Reprogramming our cities: how digitalization, economy and mobility are changing our cities

Thomas Sevcik, CEO, arthesia - Hong Kong, Zurich,
Los Angeles

14:25 Wrap-up & close

Andrea Carpenter, Women Talk Real Estate - London

14:30 Networking lunch

11:40 Coffee break



12:10 Industry discussion: How innovation and demographics impact on the real estate market?

Arjan Dingste, Director, Senior Architect, UNStudio -
Amsterdam

Sebastian Junghaenel, Co-Founder and Managing
Director, Zeitgeist Asset Management - Prague

Jeroen van der Toolen, Managing Director CEE,
Ghelamco - Warsaw

Waldemar Olbryk, Member of the Management Board,
Echo Investment - Warsaw

Moderator: Andrea Carpenter, Women Talk Real
Estate - London



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Conference Speakers



Karol Bartos

Atrium European Real Estate

Karol Bartos has nearly 15 years of professional experience in asset management, development, investment, leasing and finance in Poland and European markets. He took his position of Group Head of Asset Management at Atrium European Real Estate in March 2018. Prior to joining Atrium, Karol was an Executive Director at Tristan Capital Partners in London, where he was responsible for asset portfolios in Central and Eastern Europe, Scandinavia and Germany. In his career he managed projects with a total value of over €3 billion, these being Rondo 1 in Warsaw, Warsaw Financial Center, Karolinka and Zakopianka shopping centres in Opole as well as the retail development projects of Kronen Vanlose, a shopping centre in Copenhagen, and the Royal Bavarian hotel in Munich.

Karol Bartos is a member of the Royal Institute of Chartered Surveyors (MRICS) and a Certified Commercial Investment Member (CCIM). He completed his master's studies at the Warsaw School of Economics.



**Magdalena
Bartkiewicz-Podoba**

**General Manager
Liebrecht & wood Poland**

Magdalena Bartkiewicz-Podoba has been with the Liebrecht & wood Group for 20 years. She worked as Legal Department Director and since 2002 she had been co-managing day-to-day operation of the company, first as a board member, then as a partner and shareholder. She also held the position of General Counsel, being responsible for major transactions and supervising legal services of the Liebrecht & wood Group companies in Poland, Russia and Romania. In her current position, she executes real estate projects in Poland and manages the team at the Warsaw headquarters of the Group.

Magdalena Bartkiewicz-Podoba graduated from the Faculty of Law and Administration of the University of Warsaw (1997). She also completed British and European Legal Studies by University of Cambridge in collaboration with the University of Warsaw and postgraduate studies in negotiation and mediation at the Warsaw School of Social Psychology (2001). In 2005 Magdalena Bartkiewicz-Podoba qualified as a Polish legal advisor. She is married and has three daughters. She is also a chairman of NonIron Foundation Council.



Andrea Carpenter

Women Talk Real Estate

Andrea Carpenter is a Director of Women Talk Real Estate, and a writer and communications consultant in the property industry.

As a Director of Women Talk Real Estate, Andrea helps raise the visibility of female experts in the industry through the stage and media. On the writing side, her book about the history of the modern European property industry, *High Rise and Fall*, was published by Routledge in September 2018.

Andrea began her career as a journalist at Property Week before moving on to be editor of EuroProperty for seven years. Following this she worked for various industry bodies including the Urban Land Institute, INREV in Amsterdam, and its sister organisation ANREV in Hong Kong. On returning to the UK, she worked as Head of Marketing and Communications EMEA at CBRE Global Investors.

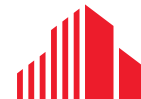


Arjan Dingste

Director, Senior Architect,
UNStudio

Arjan is responsible for the managerial, technical and aesthetic aspects of projects from concept to construction. Having worked on several key projects of the office, such as the Mercedes-Benz Museum in Stuttgart, the Arnhem Central multimodal station, Rabobank Offices, the Booking.com campus and several other complex projects, like mixed-use, hotel, commercial, public and large-scale infrastructure projects, Arjan has developed an integrated approach to design management and process management and buildability aspects of complex architectural geometries. Currently, Arjan is also responsible for the design process of the Cable Car in Gothenburg. Arjan graduated from the Technical University Delft and completed his postgraduate education at the ETH in Zürich in 2000.

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Marcus Cieleback

Chief Economist

PATRIZIA Immobilien AG

Dr. Marcus Cieleback is Chief Economist of PATRIZIA Immobilien AG since 2008 and became a member of PATRIZIA's European Investment Committee in 2015. He is based in the Augsburg headquarter.

The focus of the work of Dr. Cieleback is the risk-return based analysis and comparison of European and global real estate markets and the development of models for forecasting the commercial and residential markets to develop individual investment strategies. Within these analyses special focus is given to the institutional framework of the markets, especially in the residential sector, as it provides the "rules of the game" and crucially influences the return perspectives. He is a frequent speaker at international conferences and a published author in various international journals.

Before joining PATRIZIA Dr. Cieleback worked for the German mortgage bank Eurohypo AG as Head of Research, overseeing their global research activities. Prior to that Dr. Cieleback worked at MEAG, the asset management company of Munich Re Group, developing real estate investment strategies and accompanying property transactions globally from a market point of view.

Dr. Cieleback studied economics at the University in Freiburg and the London School of Economics and completed his doctorate at the University of Bayreuth in the area of real estate finance. He is a member of the INREV Training and Education Committee, ULI's European Residential Council and the German Society of Property Researchers.



Xavier Jongen

MD

Catella Real Estate

Xavier Jongen, MD Catella European Residential, graduated from Sciences-Po Paris, holds a post-graduate Master of the College of Europe in Bruges (with Honours) and the Cambridge IPF Diploma. Further trainings at Fannie Mae, Stanford Business School and the Ayn Rand Institute.

Xavier was the first to introduce a pan-European residential investment fund in 2007. Out of this, a team and Alliance grew that invested over 3 bn in European residential covering 9 countries and 9 sub-sectors. Xavier started analysing housing and capital market fundamentals whilst working for World Bank/IMF/EU structural adjustment programmes to

liberalise socialist housing markets in Central and Eastern Europe as well as Russia, after the fall of the Berlin wall. From 1996 to May 2005, Xavier worked in parallel as public speaker for the European Commission in Brussels, where he debated on the need for EU integration in front of priority groups like intellectuals, captains of industry and politicians. He co-founded the SOLUM foundation where the 12 most powerful real estate CEO's gathered annually in Cambridge or Nyenrode to discuss matters of globalisation, until its implosion in 2008. He was the module leader for indirect investments at Cambridge University from 2006-2016, chaired the first INREV Public Affairs committee and currently co-chairs the first ULI European Residential committee.

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Sebastian Junghänel

Zeitgeist Asset Management

Sebastian Junghänel is one founding partner of ZEITGEIST Asset Management. He is Managing Director in Germany, Czech Republic and Poland for Zeitgeist and Chief Operating Officer (COO) of the Zeitgeist Group. Prior to ZEITGEIST, Sebastian worked in institutional real estate in Germany, Central Eastern Europe and Turkey for more than 10 years. He is registered as licensed architect in Germany and holds a Diploma degree in Industrial Engineering and Management from Technical University Berlin and a Diploma in Architecture from University of the Arts, Berlin, Germany.



Monika Laudenska - Sobik

Benoy

Monika has over 25 of experience in design development and delivery of high quality multimillion mixed-use projects. Based in the London office of Benoy, Monika is recognized within the industry for her ability to bring complex designs to fruition. She worked with some of the leading commercial developers in UK, Europe, Middle East and Asia; She successfully combines her management skills, technical acumen and commitment to develop sustainable design with an understanding of client objectives and design vision. Throughout her career, Monika has led design teams and managed many significant projects. These include Dubai Creek Harbour, the repositioning and retail and leisure expansion of a Liffey Valley centre in Dublin; the King Abdullah Financial District in Riyadh creating a new 126,000m² commercial destination featuring 30-storey mixed use towers within a new business quarter of Riyadh; and the Chadstone Shopping Centre expansion in Melbourne.



Simon Kuper
Financial Times

Award-winning Simon Kuper has been writing for the Financial Times for most of the last 20 years. His column in the weekend magazine is highly respected, and read by tens of thousands of people around the world.

Although he is now best known for his liberal observations on modern life, Simon is also well-known for his insights into sport – whether the topic is sports stars, the sports business, or the interactions between sport, politics, economics and culture. His book “Football Against the Enemy” (1994), which won the William Hill Sports Book Of The Year that

year, focused on how different cultures shape the way different nations played the game. His book “Soccernomics” (2012), co-authored with Stefan Szymanski, examines how insights and analogies from economics, statistics, psychology, and business can help us understand success and failure in football.

A collection of his profiles of footballers and football managers, “The Football Men”, appeared in April 2011. As well as being a prolific writer, Simon Kuper often appears on television as a sport and cultural commentator.



Wojciech Ławniczak
Head of Strategy
and Innovation, CEO
Very Human Services

Advisor, service designer, strategist, entrepreneur with 19 years of experience. Focused on strategic development projects related mainly to service management based on innovation and design (among others the concepts of Human-Centred Design, Open Innovation and Value Co-creation), both for private and public sector. One of the pioneers of Design Thinking and Service Design movement in Poland.

The founder of Very Human Services - design consultancy, the co-founder of Service Design Poland – service innovation think-tank.



Bartosz Mierzwiak
Managing Director, CEE
Logicor

Bartosz Mierzwiak is Managing Director, Central & Eastern Europe, responsible for the day to day management and operation of Logicor's platform in Poland, Czech Republic, Hungary, Romania and Slovakia. Prior to joining Logicor in September 2014 he spent four years at Prologis as Country Manager, Poland, overseeing asset management, development, built-to-suit and leasing operations in Poland. Prior to that he was with Jones Lang LaSalle Poland for nearly eight years where he was responsible for office leasing across Poland, advising tenants, investors and developers. Mr. Mierzwiak is a graduate of the Warsaw School of Economics and also holds a Law & Administration degree from Warsaw University.



Marta Machus-Burek

Director of Retail Agency
Colliers International

As the Director of Retail Agency Marta Machus-Burek oversees a team of 16 experts. She has over 21 years of experience which spans across strategic advisory for shopping center owners and investors, mixed-use projects, as well as shopping centers' value management, leasing of space and marketing of shopping centers. Moreover, Marta provides strategic advisory for retail chains, including expansion plans and competition analysis. She also advises on the development strategy for the acquisition and sale of retail chains.

During her career, Marta advised such clients as: Carrefour Polska, IKEA Centres Polska, Credit Suisse, Invesco Real Estate Polska, Helios, Immochan, CVC, Mid Europa, to name just a few. Marta graduated in management from Warsaw University. She is a member of Core EMEA Retail Group within Colliers, which is a platform for sharing knowledge and experience among retail real estate experts from the EMEA region. Members of the platform share best business practices and support clients from the retail sector in expansion in Europe, the Middle East and Africa.

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Waldemar Olbryk

Member of the Management Board

Echo Investment

Waldemar Olbryk is responsible for the development of the residential sector. He joined Echo Investment in August 2017. Earlier he worked for companies from the Skanska group, including positions such as: the Director of Business Development and a Team Manager responsible for new business such as public private partnerships or shared services. Until 2008 he worked for Philips Poland, Apsys Poland and BP. He is a graduate of International Economic Relations at the University of Łódź and he also completed MBA studies at the University of Lodz and the University of Maryland.



Soren Rodian Olsen

**Partner, Head of Capital Markets
Cushman & Wakefield**

Soren leads the capital markets team and is responsible for providing investment consultancy & advice for investors in the sale and acquisition of commercial properties in office, industrial and PRS sectors. Soren has 16 years of senior management and real estate experience in Poland. He joined Cushman & Wakefield in September 2011. Prior to that he was Head of Asset Management Poland for Aberdeen Asset Management, managing a €450m office portfolio. During 2002-2008 Soren worked for Bank BPH (Bank Austria Creditanstalt) and BRE Bank (Commerzbank).



Guy Perry

Vice President, Urban Planning and Design

McKinsey & Company

Guy is an architect, urban designer, and developer with global experience in creating economically viable, environmentally sustainable, human-centered environments. He applies this expertise to McKinsey's work on some of the Middle East's largest and most complex multidisciplinary projects.

For over 30 years, Guy has spearheaded development and design in a wide range of urban settings around the globe, receiving accolades from the International Academy of Health and Design, ISOCARP, the SOM Foundation and the Urban Land Institute.

Prior to joining McKinsey, Guy planned and designed key components of the Barcelona Olympics. He led sustainable urbanization initiatives as president of cities and strategy at the Essel Group and, as an executive director of AECOM, he oversaw smart and healthy city innovations on human and ecological metrics throughout Asia-Pacific.

He has played a key role in urban expansion and regeneration across China, Hong Kong, Hungary, India, the Philippines, and Poland, as well as in conservation strategies in the Amazon rainforest.

Guy has taught and lectured at Harvard University, Hong Kong University, and the Massachusetts Institute of Technology.

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Thomas Sevcik

CEO
Arthesia

Thomas Sevcik is the co-founder of internationally acclaimed frontier strategist arthesia based in Hong Kong, Zurich and Los Angeles. He holds an Architecture degree from Technische Universität Berlin. Thomas works on repositioning and brand narrative projects for companies, organizations and cities. He is also the mastermind behind innovative large and unique real estate projects ranging from corporate theme parks and brand experiences to AirportCities, urban districts and special zones. Thomas lectures at Central Saint Martins College of Arts in London and at Hong Kong University, is a frequent commentator and panelist and sits on several advisory boards.



Martin Polak

MD, Regional Head CEE
Prologis

Martin Polák is managing director, regional head Central and Eastern Europe. Leading 80 associates, he oversees all activities of Prologis in the Czech Republic, Hungary, Poland and Slovakia, including new developments, customer relations and working with local development teams. He is also responsible for the performance of all operating properties in the region.

Polák joined Prologis in 2008 as leasing manager for Slovakia and established Prologis' Bratislava office. Since then, he has held various positions and overseen many of the company's successful projects in the Czech and Slovak markets. Prior to joining Prologis, he worked for IPEC Group, where he was manager for land assembly projects for logistics and industrial developments. Polák graduated from Slovak Technical University in Bratislava as a civil engineer with a degree in economics and construction industry management.



Jeroen van der Toolen

CEO

Ghelamco

Jeroen van der Toolen is an acknowledged expert in the field of commercial and residential real estate. Currently the head of Ghelamco in the CEE region. He joined Ghelamco in 2003 as a Managing Director for Poland and 3 years later was appointed Managing Director for CEE. Since 2006 Ghelamco has grown threefold. He brought bold vision and innovative strategy to company's operations and expanded Ghelamco's field of activity to new market sectors. As a provider of modern business space Ghelamco reached a position of a market leader with over 1 million square meters delivered up to date, and the value of sold projects exceeding 1.2 billion EUR.

Creating functional urban tissue that serves the local community and benefits for the city became one of Jeroen van der Toolen priorities. For this purpose „Sztuka w Miescie” Foundation was founded which goal is to improve the quality of urban space through cultural and artistic events. The flagship example of this strategy is the Warsaw Spire office complex with a unique arrangement of its surrounding,.

Ghelamco nowadays is an unquestionable leader in sustainable development in Poland, with the highest number of BREEAM-certified office schemes, as well as the first certificate at Excellent level for a completed office building and many design and development awards.



Dorota Wysokinska-Kuzdra

**Partner, Corporate Finance CEE,
Colliers International**

ULI Poland Chair

As Partner and Head of the Corporate Finance business line in CEE, Dorota provides advice on customers' financial needs, including debt and mezzanine financing, capital raising and gaining joint venture partners, as well as offering support in M&A and IPO transactions.

Before joining Colliers International, Dorota spent 11 years as Senior Partner at Griffin Real Estate, where she was responsible for the group's management and investments, and also for the first mezzanine fund operating in Poland. Recently, she has been involved in the creation of a logistics platform co-managed by Griffin. Earlier, as CEO at Griffin Premium RE, the first REIT-type fund, she successfully launched the fund on the Warsaw Stock Exchange.

She was a member of the team responsible for acquiring shares in Echo Investment SA, one of the biggest transactions on the Polish real estate market, in which she was responsible for due diligence and financing the acquisition. Before joining Griffin, for over 10 years she held director and executive positions in the HypoVereinsbank/UniCredit Group, and also in their subsidiaries, which monitored real estate investment banking and managing real estate. At the beginning of September 2018, Dorota took over as chairperson in the Polish branch of the Urban Land Institute, the international non-profit organisation. Dorota Wysokinska-Kuzdra is a graduate of SGH Warsaw School of Economics, the University of Cologne and the University of Duisburg-Essen.

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Michał Toporowski
Cushman & Wakefield



Bernard Zakrzewski
University of Warsaw

Authors of “The Decision Book: 50 Models for Strategic Thinking”



Mikael Krogerus



Roman Tschäppeler

Roman Tschäppeler is a creative producer. Mikael Krogerus is a reporter. Both are authors of the international bestseller «The Decision Book» Their keynotes are full of insights into the psychology of choice, all wrapped up in a playful way. Why can't we make up our minds? How do I limit my options? And what do Donald Rumsfeld and Yin and Yang have in common? Their one-of-a-kind visual storytelling offers a fresh look at decision behavior.

Mikael Krogerus, born in Stockholm, graduated 2003 from the Kaospilot School in Denmark. He worked for youth TV show «Chat the Planet» in New York and in Zurich for NZZ Folio, the monthly magazine of «Neue Zürcher Zeitung». He is now an editor with DAS MAGAZIN, Switzerland's biggest weekly supplement.

Roman Tschäppeler, born in Berne, graduated 2003 from the Kaospilot School in Denmark and received a Master degree from the University of Arts Zurich. He is a creative producer. He has been producing various projects ranging from documentaries and ad campaigns to pop music and cook books. www.guzo.ch

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One of ULI Poland's top priorities is to become a key influencer in the real estate landscape. As an organisation, we have the potential to find realistic solutions to local problems—solutions that will allow us to have cities that are more vibrant, dense, attractive and innovative.

To help realise this potential, increasing awareness of ULI in Poland is essential. To raise our public profile, we aim to focus our programming on important local issues, stage large-scale events that attract diverse audiences, and foster partnerships with local organisations. Through effective and inspiring programming, we hope the public will learn about ULI's mission, what it offers members, and what it brings to our communities.

We could not achieve these goals without members who play an active role in shaping our programmes and initiatives. If you are interested in becoming more involved with ULI Poland, please e-mail poland@uli.org.

photo: SKANSKA

