

A Tale of Two Cities

Frankfurt/Offenbach Germany ULI Advisory Services Panel



ULI UK
2016 Trends Conference

ULI Urban Land
Institute
Advisory Services Program

ULI Advisory Services Program

Since 1947

15 - 20 panels a year on a variety of subjects

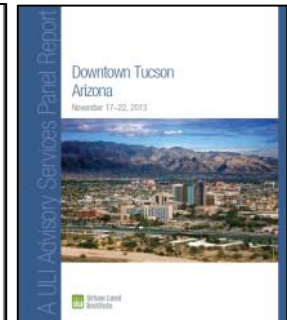
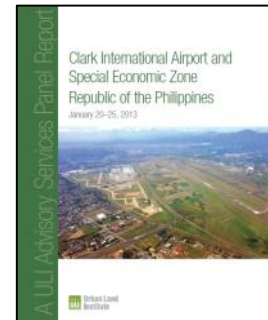
Independent, objective candid advice on important land use and real estate issues

Process

- Review background materials
- Sponsor presentation and tour
- Conduct stakeholder interviews
- Consider data, frame issues, and write recommendations
- Make presentation
- Produce a final report.

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Frankfurt/Offenbach
Germany

...a cornerstone in ULI's outreach



The Frankfurt Offenbach Panel

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Frankfurt/Offenbach
Germany



....diverse team of volunteer experts

Bill Kistler, Kistler & Company, London (Panel Chair)

Tim-Philipp Brendel, Architekt AKHH, ZT, Hamburg,

Christopher Choa, AECOM, London

Rui Coelho, Invest Lisboa, Lisbon,

Bernhard Hansen, Advisory Board Chairman, ULI Germany

Alan Razak, AthenianRazak LLC, Philadelphia

Sebastian Reich, Sebastian Reich Consult, Germany

Trini Rodriguez, Parker Rodriguez, Virginia, USA

Christiane Thalgott, Stadtbaurätin München I.R., Munich,

Bob van der Zande, Development Corporation, Amsterdam

The Panel Assignment

...enhancing competitive advantage

How can Offenbach and Frankfurt better collaborate to create a more competitive metropolitan region?

- Creating a stronger regional core
- Attracting talent, Jobs & investment
- Embracing synergies
- Celebrating diversity
- Strengthening connections
- Accommodating growth



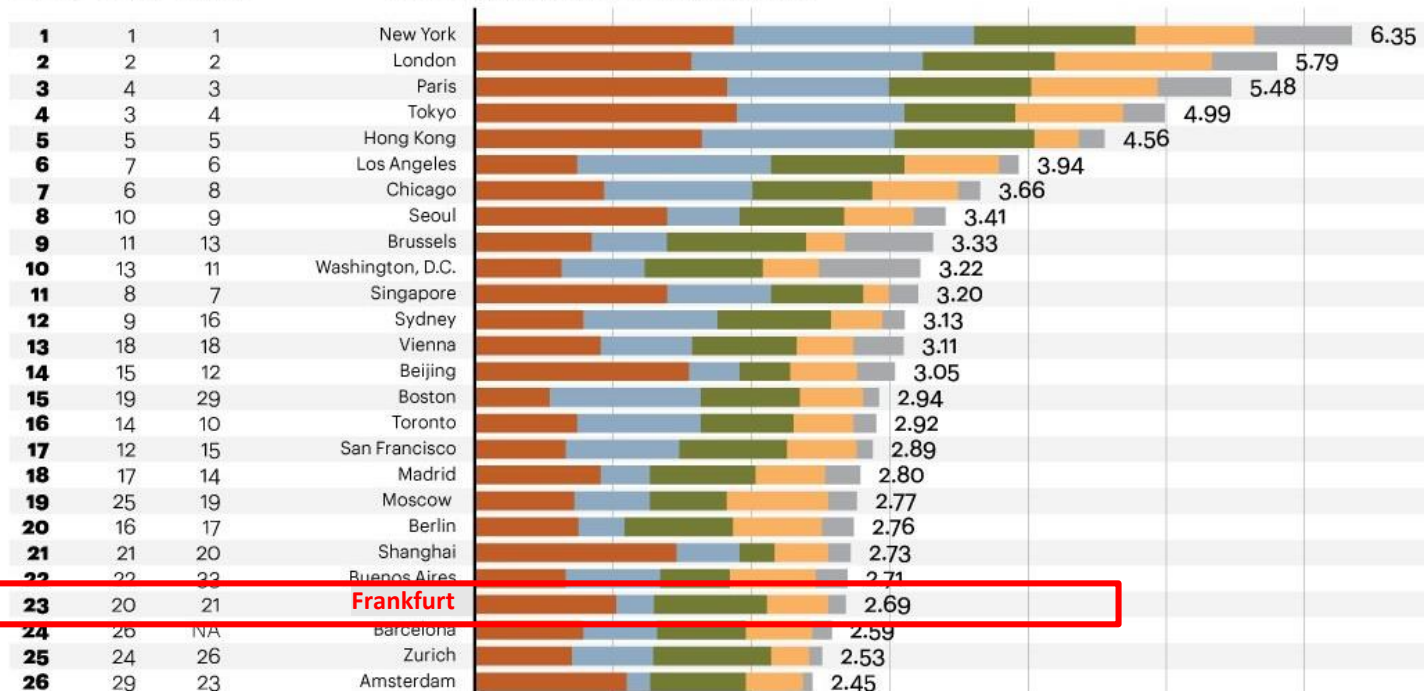
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Global Competition

....for talent, jobs & investment

2012 2010 2008

Values calculated on a 0 to 10 scale



Business activity (30%)

Information exchange (15%)

Political engagement (10%)

Human capital (30%)

Cultural experience (15%)

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Declining Fortunes

....losing ground vs. other global cities

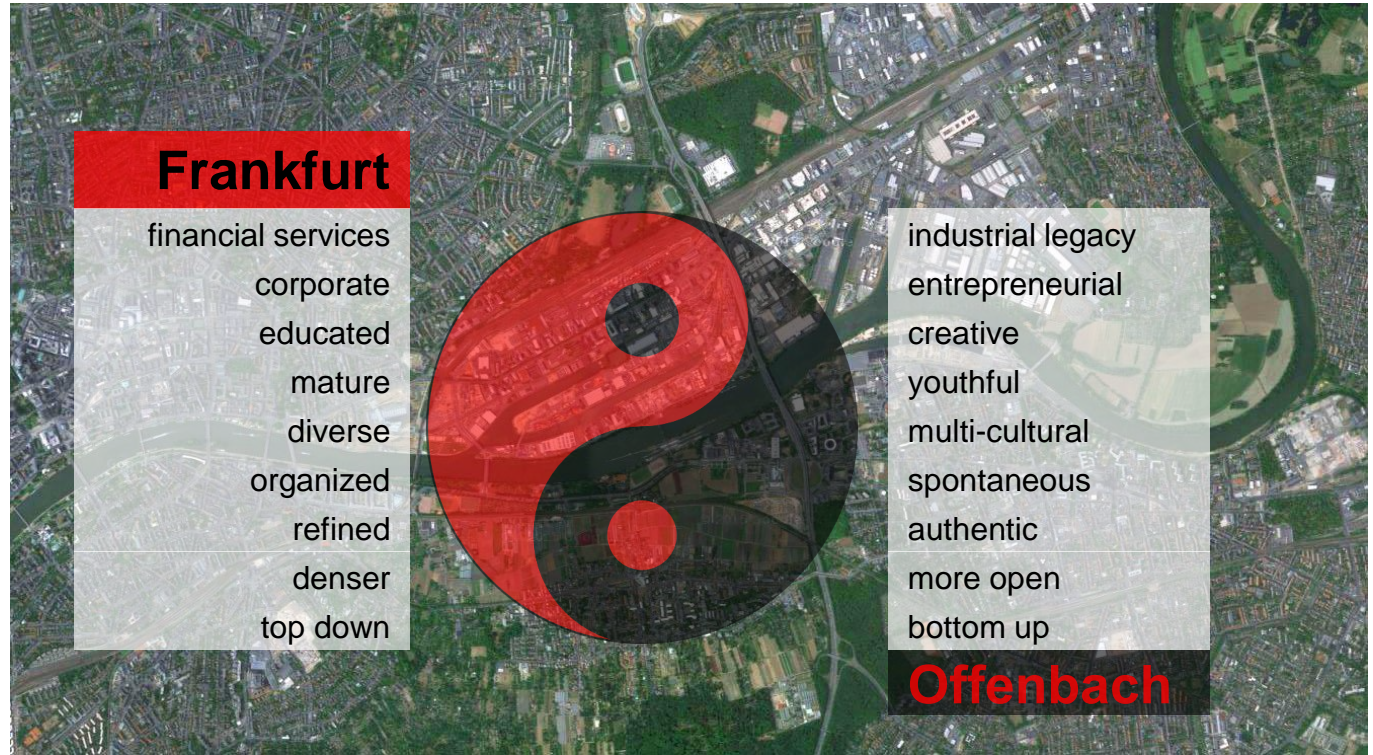
Rank 2025	Change from 2012	City	Score/100	Change from 2012
1	+1	New York	75.7	+7.1
2	+4	London	73.1	+5.3
3	-2	Singapore	71.2	+0.6
4	-1	Hong Kong	68.1	+0.1
5	-2	Tokyo	68.0	-0.1
6	+2	Sydney	67.3	+4.5
7	-2	Paris	67.0	-0.9
8	+5	Stockholm	65.7	+5.7
9	+3	Chicago	65.6	+4.6
10	-	Toronto	64.7	+2.6
-11	+14	Taipei	64.1	+6.5
-11	-4	Zurich	64.1	-
13	-2	Amsterdam	63.8	+2.0
14	+3	Washington	63.2	+4.0
-15	+6	Copenhagen	63.0	+4.9
-15	+7	Seoul	63.0	+5.0
17	+7	Los Angeles	62.7	+5.0
18	+1	San Francisco	62.5	+4.0
19	-3	Boston	62.3	+2.7
-20	-11	Frankfurt	62.0	-0.3
-20	-6	Melbourne	62.0	+2.2

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Complementary Character

...an opportunity to leverage synergies

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Neighbors & Rivals

...changing perceptions

Frankfurt



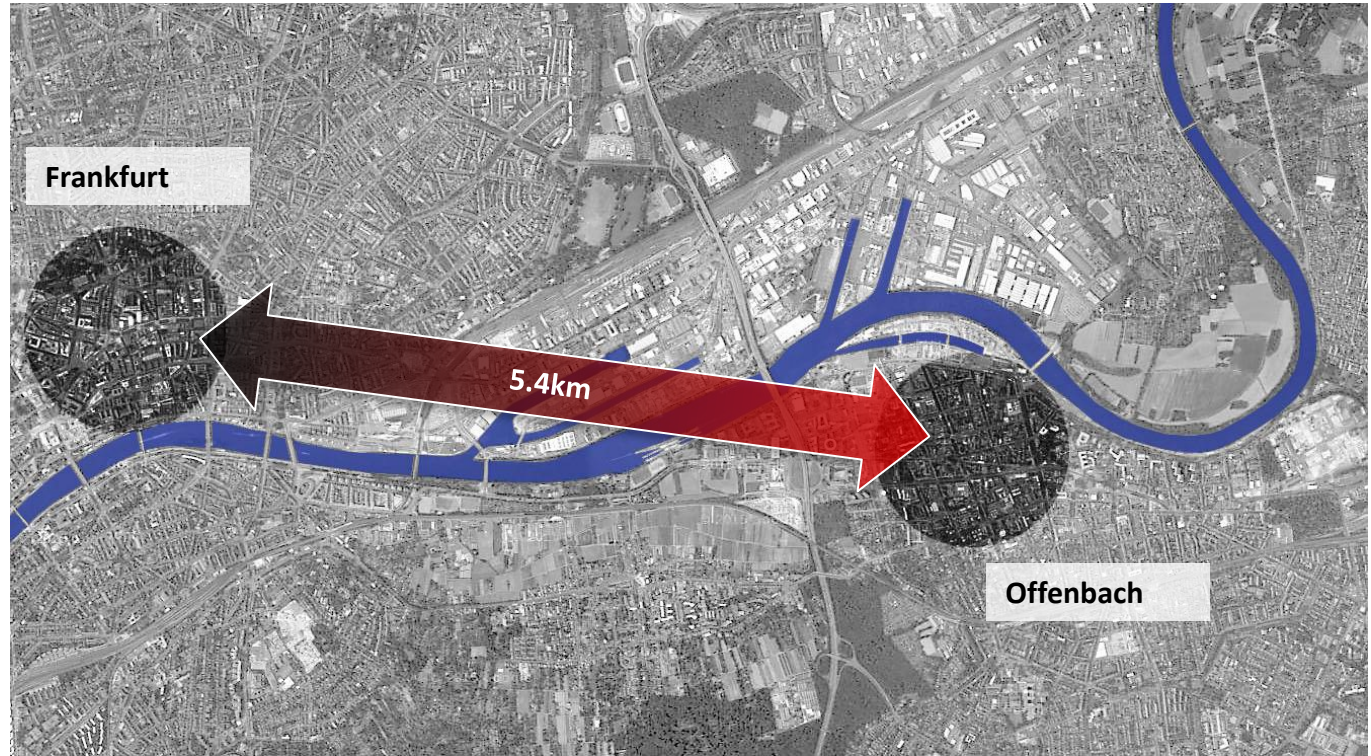
Offenbach



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Close Proximity

...creates unique opportunity

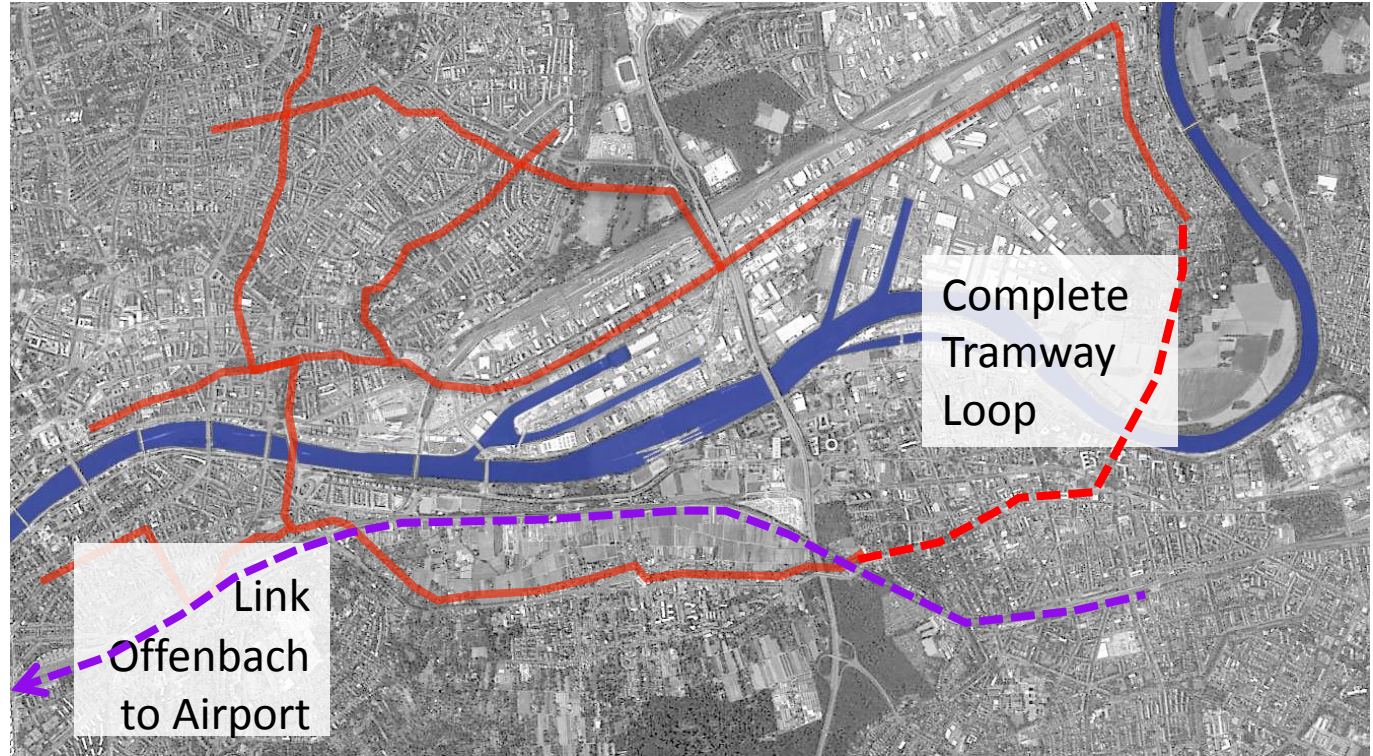


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Building Strong Connections

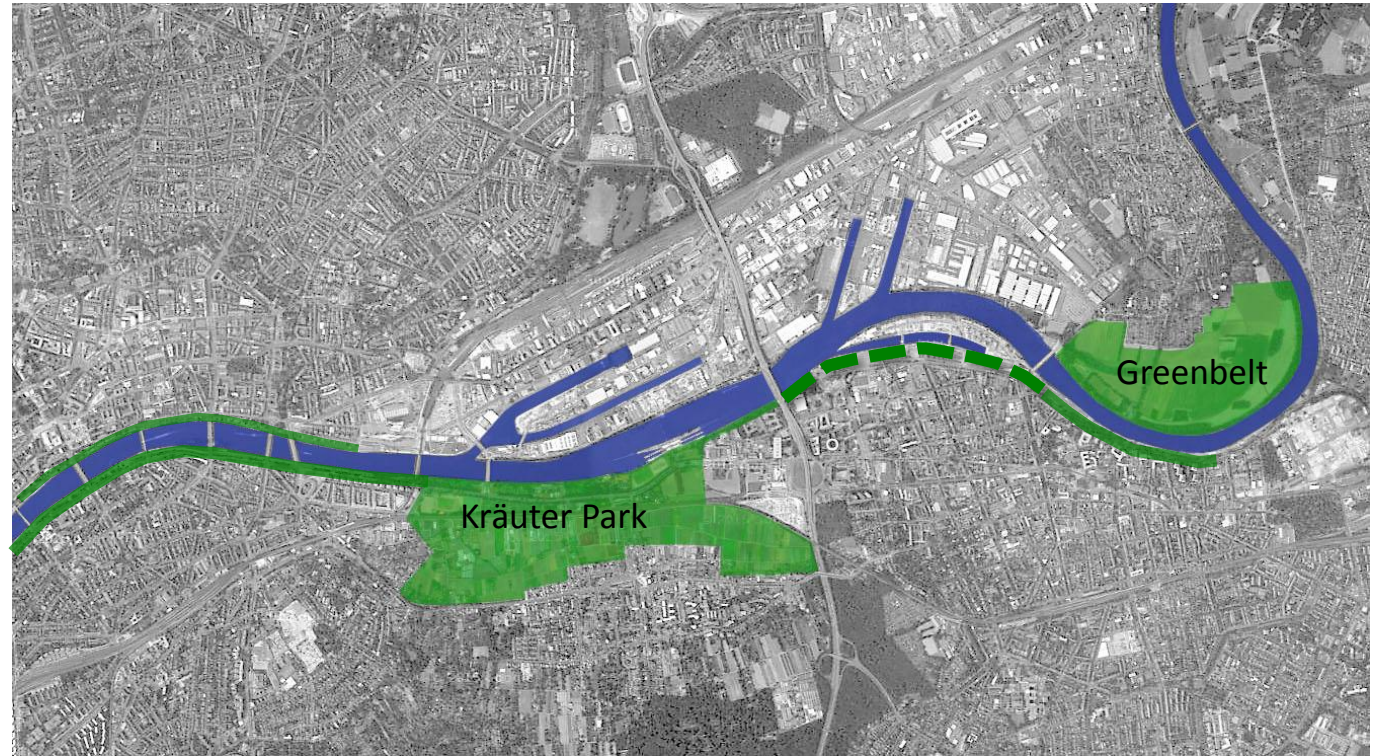
...so close, yet so far

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River & Open Space

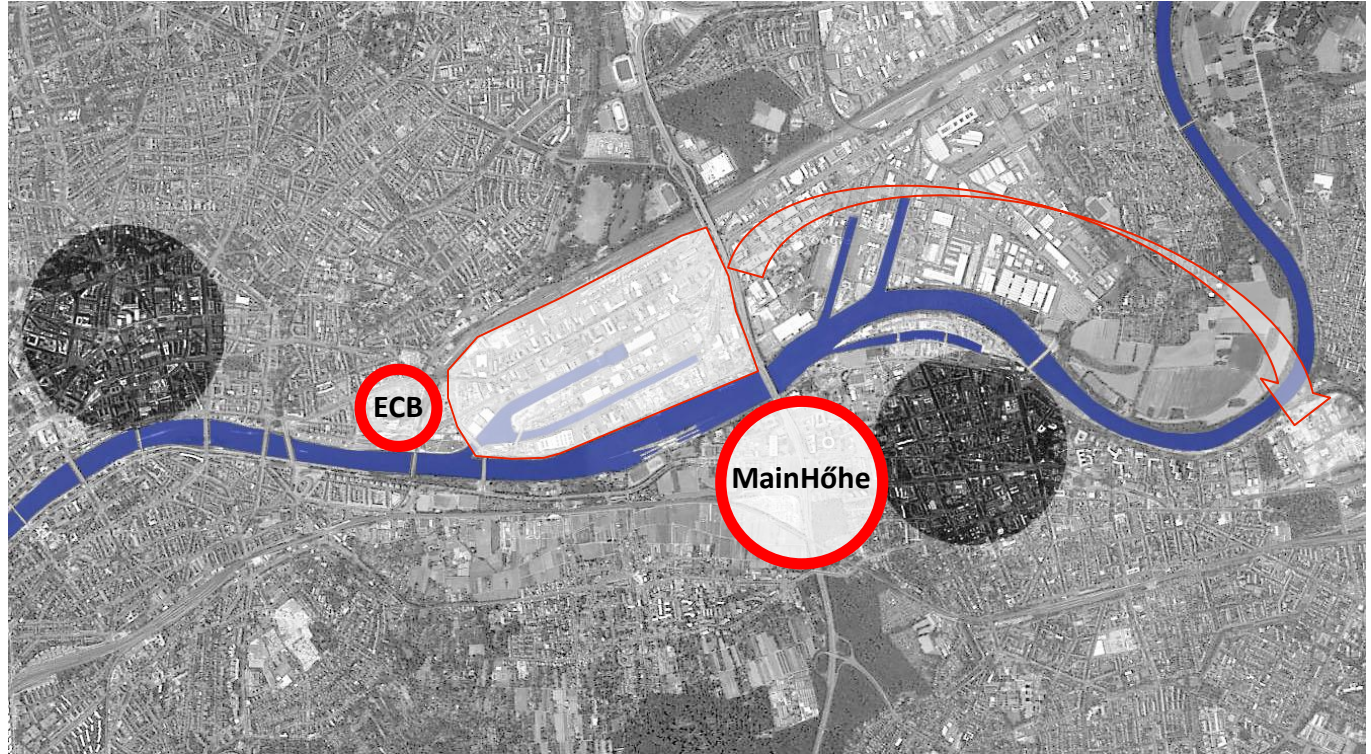
...bringing people together



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Thinking Big & Bold!

...logical path of development



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A New Spirit of Collaboration



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