



KYIV INVESTMENT FORUM
Creating the future together

KYIV-CITY

New International Business District
& Sustainable Urban Development



We live in FINANCIAL TIMES®



KYIV-CITY International Business District

Key Objectives

Play a catalyst role in employment dynamics and sustainable urban development by setting new business friendly and environmental standards.”



Competitive, and dynamic business environment, encouraging employment and innovation

- Enhance high added value employment by providing affordable office space and services
- Create Business focused Education & Conference Cluster



Comfortable improving standards of working and living

- Create a new mixed used urban sub centre: that connects with the surrounding area
- Set new environmental & life quality standards: eco urban district to work and live
- Maintain & develop activity close to public transportation means



Unique, preserving and developing identity

- Create a new business district providing a new image for Kyiv as a business city
- Set new architectural and urban standards



Transparent Governance system

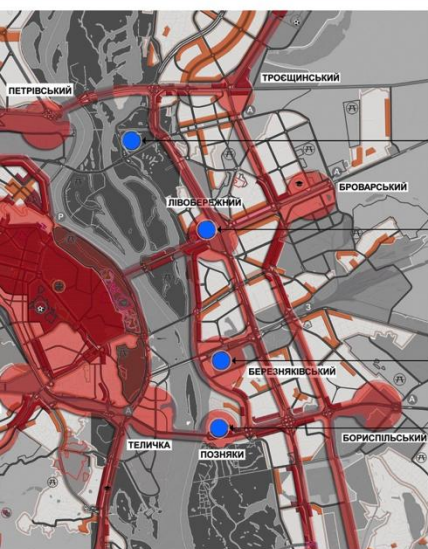
- Provide a secured investment framework: set up a fully controlled and planned development



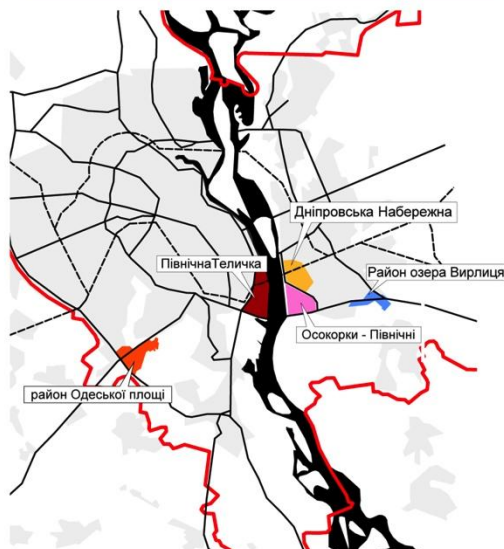
KYIV-CITY International Business District

In the context of urban development of the city

ГЕНЕРАЛЬНИЙ ПЛАН,
СХЕМА ПЕРСПЕКТИВНИХ
ДІЛОВИХ ЦЕНТРІВ



5 ПІДХОДЯЩИХ ДЛЯ
КИЇВ-СІТІ ТЕРИТОРІЙ



ПРИКЛАД ПІВДЕННО-СХІДНОГО
ЦЕНТРУ ДІЛОВОЇ АКТИВНОСТІ
(ГП)



ПРИКЛАД
ГП "ОСОКОРКИ - ПІВНІЧНІ"



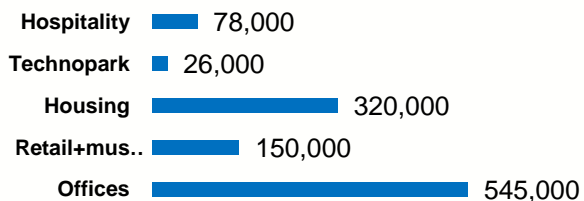
Envisaged by the Kyiv Development Strategy by 2025 and the Master Plan



KYIV-CITY International Business District

Kyiv-City as exemplified by two of the five proposed sites

Dniprovska Naberezhna (site capacity)

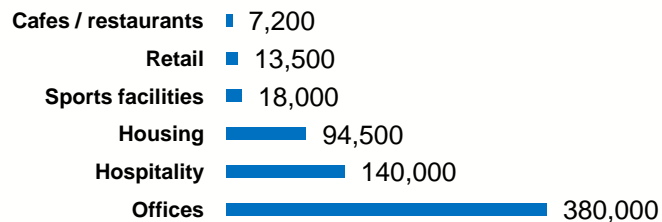


Land plot – 137.2 ha

Number of employees – 51,500 persons

Number of residents – 12,300 persons

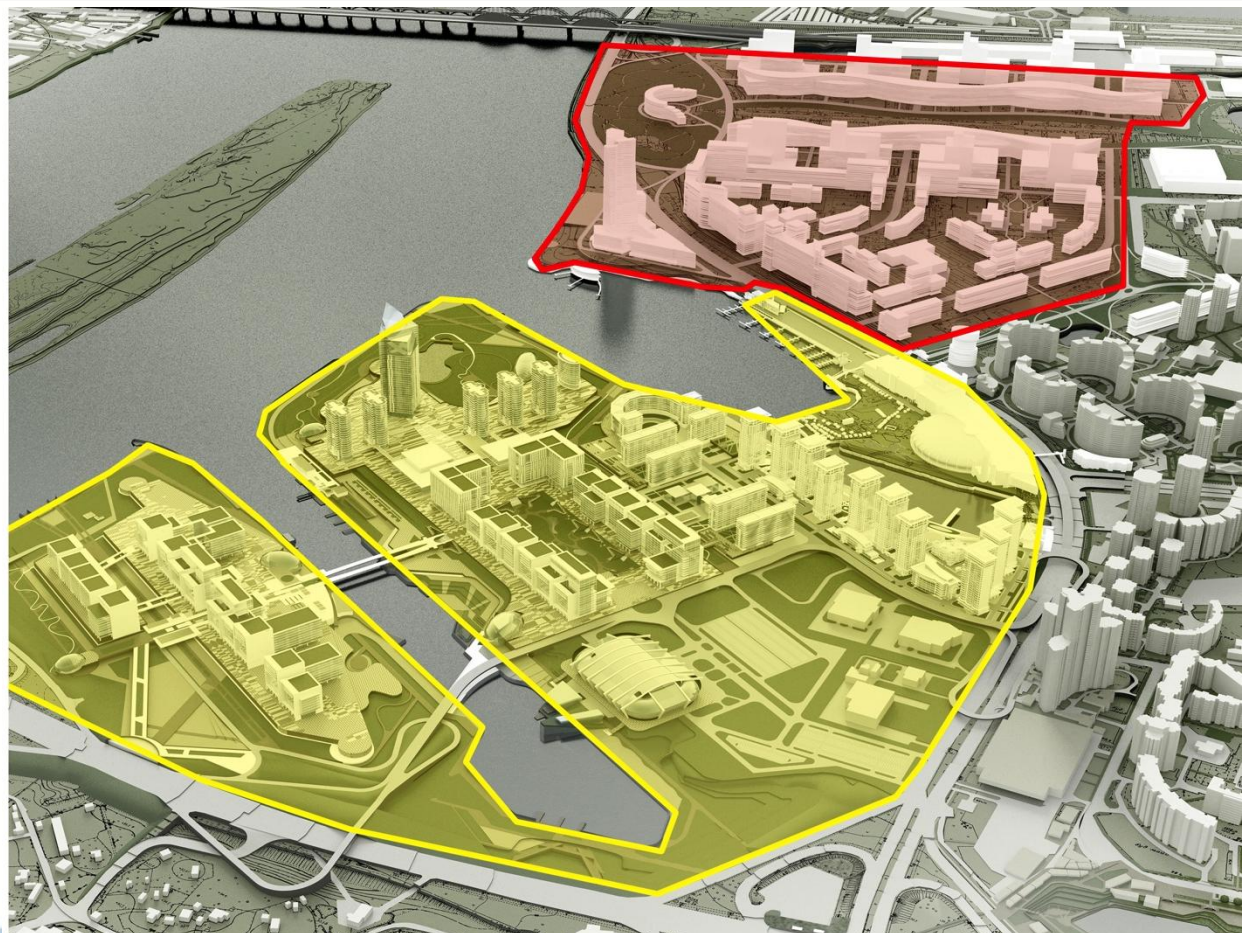
Osokorky-Pivnichni (site capacity)



Land plot – 112.1 ha

Number of employees – 27,800 persons

Number of residents – 26,000 persons





KYIV-CITY International Business District

Key Development Steps

12'2011: Initiative to develop Kyiv-City, 5 potential sites identified.

Q1'2012: Identification of development constraints and initial data prepared.

Q2'2012: DTZ appointed to develop concept & site selection, as well as highest and best use analysis of 5 sites.

Q4'2012: Development and approval of technical and economic concept of the project 'Kyiv-City', and its master plan.

Q4'2012: Set up of Kyiv City delivery organization.

Q1'2013: Tender for the individual development sites.

Q 4'2014: Delivery of first development phase.



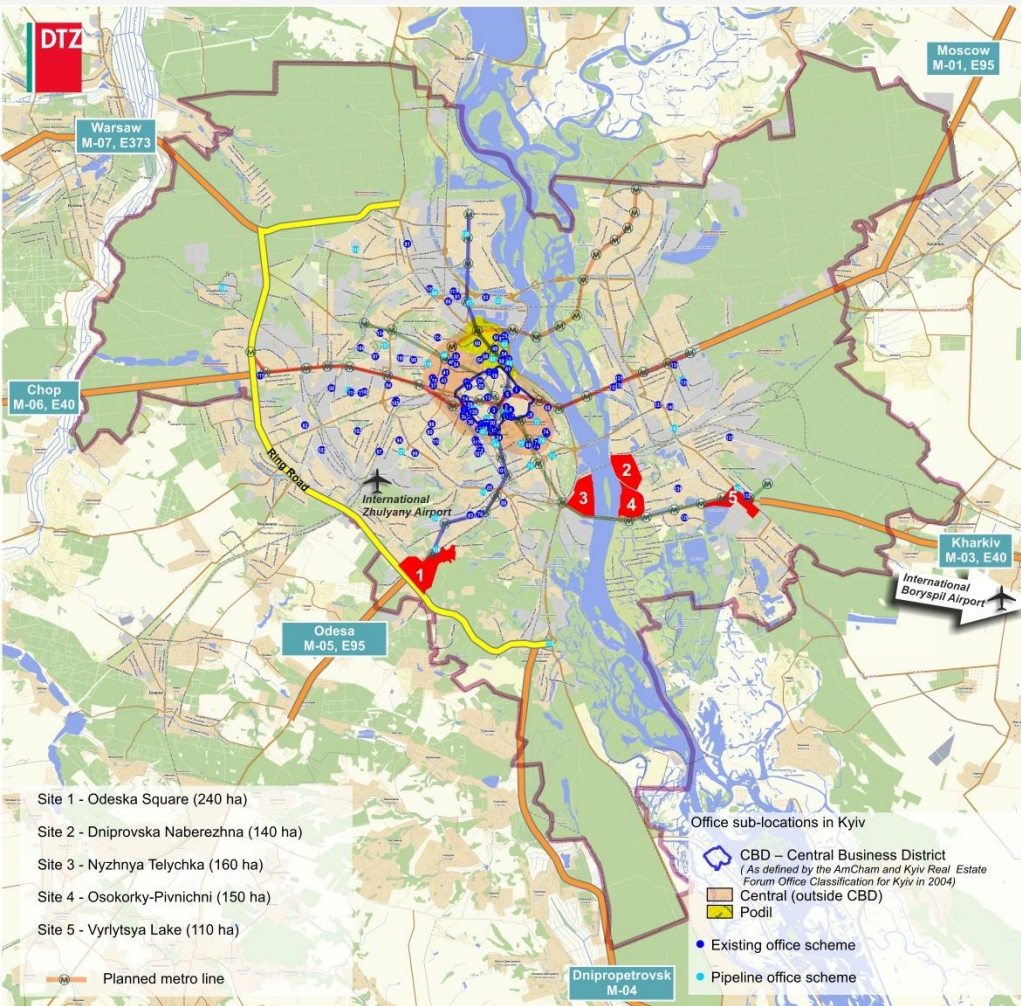


- our expectations

- Recommendations on selection of the site, which is the most suitable for the project Kyiv-City.
- Proposal on the most efficient strategy of the project development.
- Assessment of available demand and present saturation of various sectors of the property market.
- Financial analysis of the project and its marketing strategy.



KYIV-CITY International Business District: **Selected Sites**



- ✓ 100 ha to 240 ha, allowing viable mixed-use development.
- ✓ Within Kyiv core urban area.
- ✓ Well serviced by public transport.
- ✓ Connected to existing CBD.
- ✓ Good connection to International Airport.
- ✓ Close to densely populated areas.
- ✓ 3 plots with riverfront.



International Business District KYIV-CITY

International Examples: New Large Scale Business districts

Hamburg Hafen City



Land site: 123 ha
Total GFA: 2.3 mln m²
Office : 1.0 mln m²

New Public functions:

- University
- New Concert Hall
- Museums

Barcelona 22@



Land site: 198 ha
Total GFA: 4.0 mln m²
Office : 2.0 mln m²

New Public Functions:

- University
- Media Innovation Centre

Amsterdam Zuidas



Land site: 270 ha
Total GFA: 2.7 mln m²
Office : 1.2 mln m²

New Public Functions:

- University
- Medical Centre
- Conference centre

Paris Rive Gauche



Land site: 130 ha
Total GFA: 2.3 mln m²
Office : 1.0 mln m²

New Public Functions:

- University
- New National Library



KYIV-CITY International Business Area

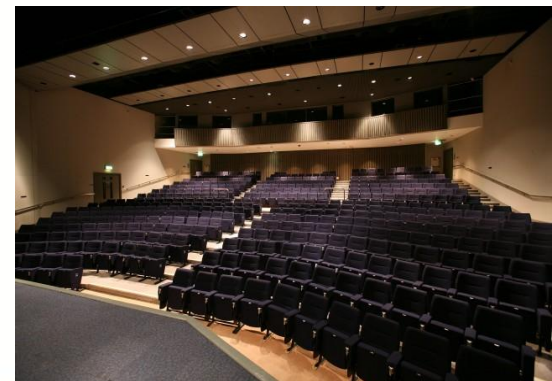
Key Components

Core components:

- **Office space:** large floor plate / low to medium rise
- **Hotels:** business hotels offering affordable accommodation
- **Conference centre:** medium sized conference and meeting centre
- **Retail:** retail offer complementary to core office function
- **Private health care & Day care centres**
- **Sports facilities, fitness centre**

Linking elements:

- **Education component** (university faculty / tech. and business school)
- **Qualitative residential** units
- **Government unit relocation**
- **Arts exhibition, concert hall**

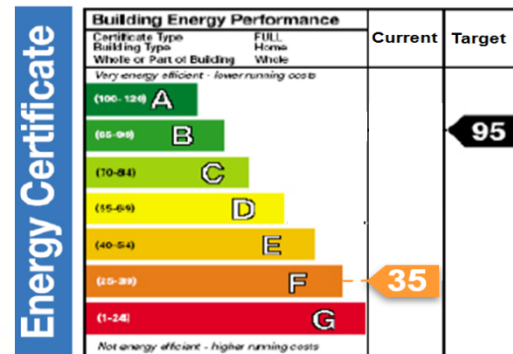




KYIV-CITY International Business District

Occupier Issues with Business Accommodation in Kyiv

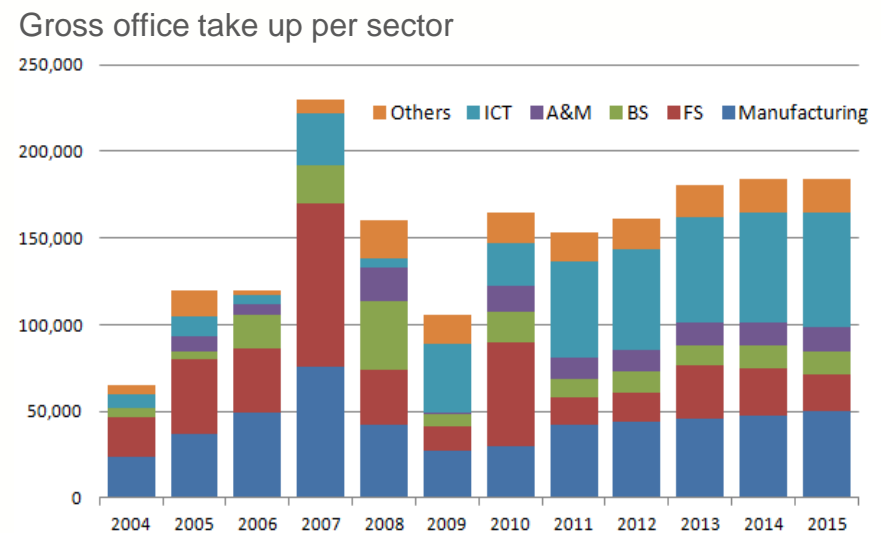
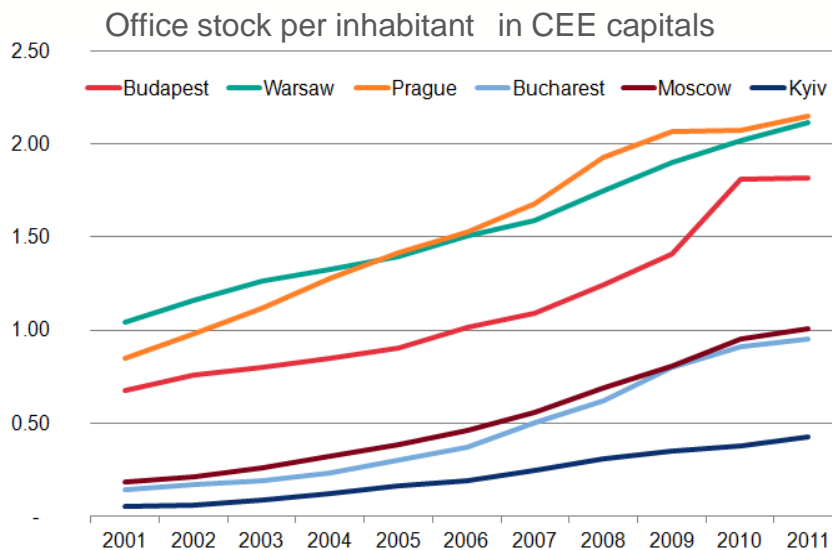
- Quality issues with 1st and 2nd generation office space
 - General building quality
 - Space efficiency
 - Delivery conditions
 - Lack of building infrastructure and poor quality M&E
- Risks on business continuity (e.g. electrical supply)
- High volatility of Occupancy Costs
- Lack of qualitative affordable efficient office supply
- General quality of public space and urban environment
- Absence of public realm and amenities within office developments
- Absence of environmentally friendly office stock





KYIV-CITY International Business District

Business Space demand trends in Kyiv



- Modern office stock in Kyiv per inhabitant remains significantly below other CEE capitals and has strong growth potential.
- Annual Gross Office space take up in Kyiv has evolved within 100k to 200k sq m band / year.
- Given the strategic locations, our very initial annual absorption model indicates ca 30-40k sq m for Kyiv City therefore a total development potential over 10 years around 300k to 400k sq m of office space.



KYIV-CITY International Business District

Key offering

For Occupiers

- Business friendly environment.
- Establishment of new technical universities providing for access to a larger, sustainable and talented workforce.
- World class efficient office space.
- Retail, hospitality, sports & conference facilities.
- Sustainable Eco district.
- Proximity to qualitative residential.
- Medium density.
- Planned and qualitative public space enriching the employee environment.
- Strong public transport accessibility.
- Unique innovative image.

For Investors / Developers

- Unique, considered development taking into account the needs of businesses.
- Strategic Urban sites.
- A tested demand driven development.
- Secure development framework.
- Full governmental support.
- A dedicated “one stop shopping” development agency .
- International marketing and positioning.



Thank you for your attention.

Contacts

Sergey Tselovalnyk

Head of State Department of Urban Development and Architecture , Chief Architect of Kyiv

+38 050 445 81 47

info@kga.gov.ua

Tamás Polster MRICS

Senior Director, Head of DTZ Consulting Continental Europe, Middle East & Africa

Tamas.Polster@dtz.com



Contacts For Investors:

Kyiv Investment
Agency

Tereschenkivska str., 11-a,
Kyiv, Ukraine

tel./fax: 38044-289-53-51

e-mail: invest@kmv.gov.ua

www.kmv.gov.ua

