

ONLINE SPECIAL | MARCH 2021

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COME BACK SMARTER

IS THE COVID-19 CRISIS MAKING THE PLACEMAKING INDUSTRY SMARTER AND MORE NIMBLE? WHAT INTERNATIONAL INDUSTRY EXPERTS HAVE TO SAY ABOUT IT.

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VIVO!

DEAR READER,

I am particularly pleased to present to you today our latest **ACROSS Online Special**. It is entitled "**Come Back Smarter**", which is to become the program for our reporting over the next few months.

After all, Covid-19 has hit the international placemaking and retail real estate industry hard. Many processes and business areas that were successful in the past have become old and less successful within a short period of time. Traditional concepts are being put to the test. Change is in the air. Despite all the tragedy and all the losses of recent months: change is fundamentally not a negative thing. And if change helps to make our industry fitter and smarter in the future, I personally have nothing against it. In this online special, we have compiled a series of articles, opinions, figures, data, and facts that are intended to show precisely this path toward greater "smartness".

I hope you enjoy reading our informative online special. And if you want to give me any feedback please send me an e-mail: r.winiwarter@across-magazine.com

Yours sincerely
Reinhard Winiwarter
Publisher ACROSS Magazine

PS.: In total, we will publish eight ACROSS Online Specials this year. This is because there are so many exciting and newsworthy topics right now that we want to make intensive use of this new and fast online format from now on. If you would like to be represented in these specials, just contact me!

PPS: I am especially proud of my **ACROSS Advisory Board**.
On February 25, we had an exciting online talk with the Board.
Here's the wrap-up of this talk.



IMAGE: ACROSS



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EUROPEAN RETAIL MARKETS PULL OUT OF DOWNWARD TREND IN FOURTH QUARTER OF 2020

IMAGE: UNION INVESTMENT

The first Europe-wide lockdown in spring 2020 sent retail markets from Scandinavia to the Iberian peninsula into an unprecedented state of collective shock. This was reflected in the European retail industry barometer, the Global Retail Attractiveness Index (GRAI), which plummeted to a historic low of 89 points in the second quarter.



- Global Retail Attractiveness Index bounces back after sharp drop in second quarter of 2020
- Germany tops GRAI ahead of Czech Republic and Ireland despite losses
- Denmark the only market to grow thanks to high consumer confidence
- Austria and Portugal suffered the heaviest losses in the retail index over the year, each declining by 21 points
- Canada ranks lowest of all 20 countries surveyed

The first Europe-wide lockdown in spring 2020 sent retail markets from Scandinavia to the Iberian peninsula into an unprecedented state of collective shock. This was reflected in the European retail industry barometer, the Global Retail Attractiveness Index (GRAI), which plummeted to a historic low of 89 points in the second quarter. A deeper crash appears to have been avoided, though. That is the conclusion reached by GfK and Union Investment, who have been compiling the GRAI for 20 countries worldwide since 2017. Despite retailer and consumer sentiment remaining stuck in the coronavirus trough, the rapid return of the GRAI (EU-15 Index) to 100 points in the fourth quarter of 2020 suggests that the steep decline has come to an end.

The negative trend was offset for the time being by the labour market, which held up well in many parts of Europe in the



*“Although the second and third lockdowns, increasing consumer concern about jobs, and retailers fearing for their livelihoods in almost all European countries have dragged the retail index down over the course of the year from minor losses, such as Germany, Ireland and the UK, to significant declines like in Austria, for example – many European retail markets have shown a degree of resilience during the crisis. This is particularly true when compared to international markets such as Japan and Canada, where volatility is currently much higher,” said **Olaf Janßen, Head of Real Estate Research at Union Investment.***





GLOBAL RETAIL ATTRACTIVENESS INDEX

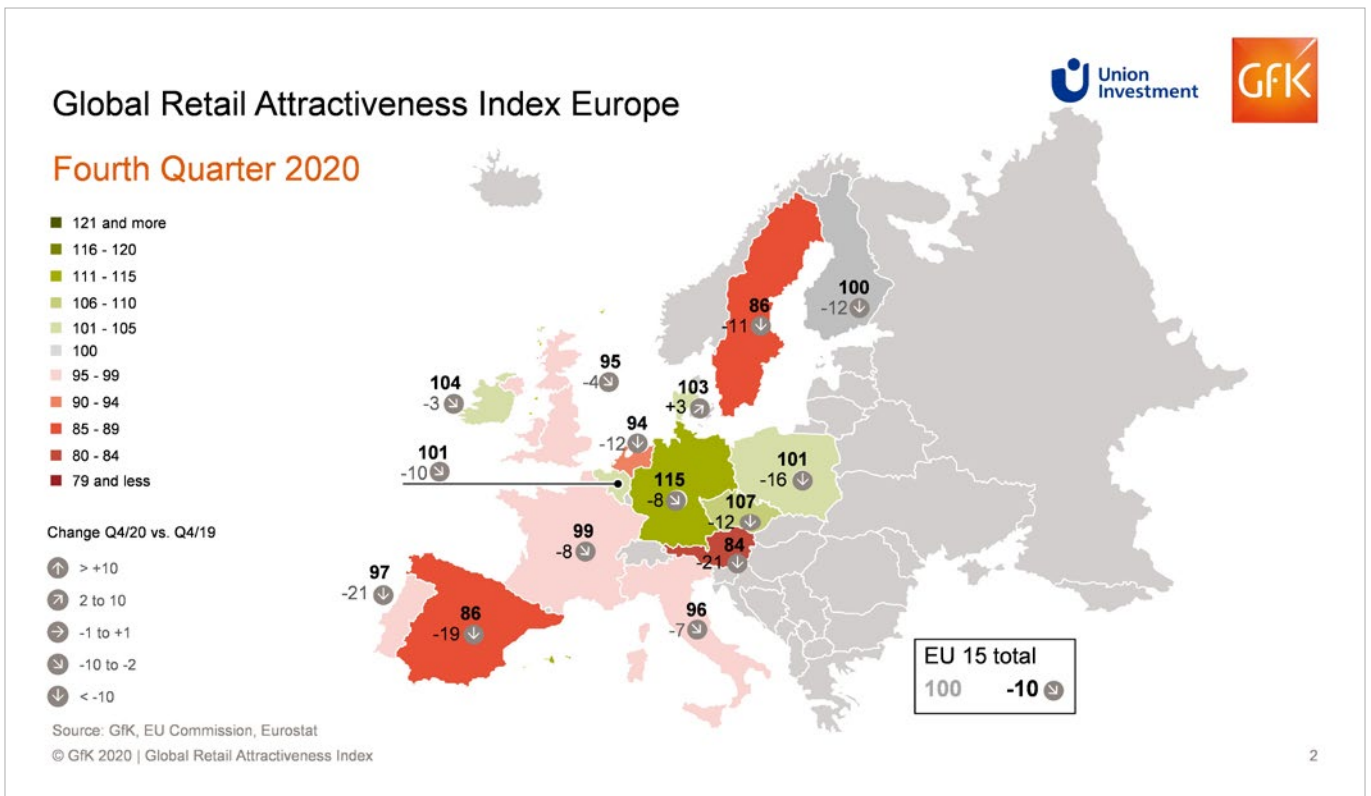


fourth quarter and was the strongest performer of the four GRAI indicators, at 123 points. France, Italy, the Netherlands and Belgium in particular did well on this front. The retail sales trend (105 points) was likewise supportive. In 10 of the 15 countries surveyed, sales showed an upward trend. Overall, however, the GRAI in Europe remains ten points below the prior-year level.

“Sentiment in the retail sector and also among consumers is currently holding the retail index back,” said Henrike Waldburg, head of Investment Management Retail at Union Investment. Having posted significant losses over the year of minus 26 and minus 16 points respectively, the two GRAI sentiment readings were well below average at 89 and 85 points. It’s also important to note that the labour market is a lagging indicator. “An ongoing recession with rising unemployment figures is likely to impact the index going forward,” commented Henrike Waldburg.

RESILIENCE IN THE CRISIS

The German retail market performed surprisingly well in the fourth quarter and bucked the wider trend. With 115 points (minus eight points compared to Q4 2019), Germany remains the clear leader in a struggling field. The leading trio in the fourth quarter of 2020 are now Germany, the Czech Republic (107 points) and Ireland (104 points). Denmark (103 points), Belgium and Poland (101 points each) also have above-average scores on the European retail index. Having said that, the latter country lost a significant amount of ground compared to last year. Austria and Portugal suffered the heaviest losses in the retail index over the year, each declining by 21 points, followed by Spain (minus 19 points). Austria was the worst performer in the fourth quarter, with just 84 points, while Spain and Sweden did only marginally better at 86 points each. Buoyed by strong consumer optimism and positive retail sales performance, Denmark was the only European country in the EU-15 Index to improve slightly year-on-year in the fourth quarter, gaining three points.



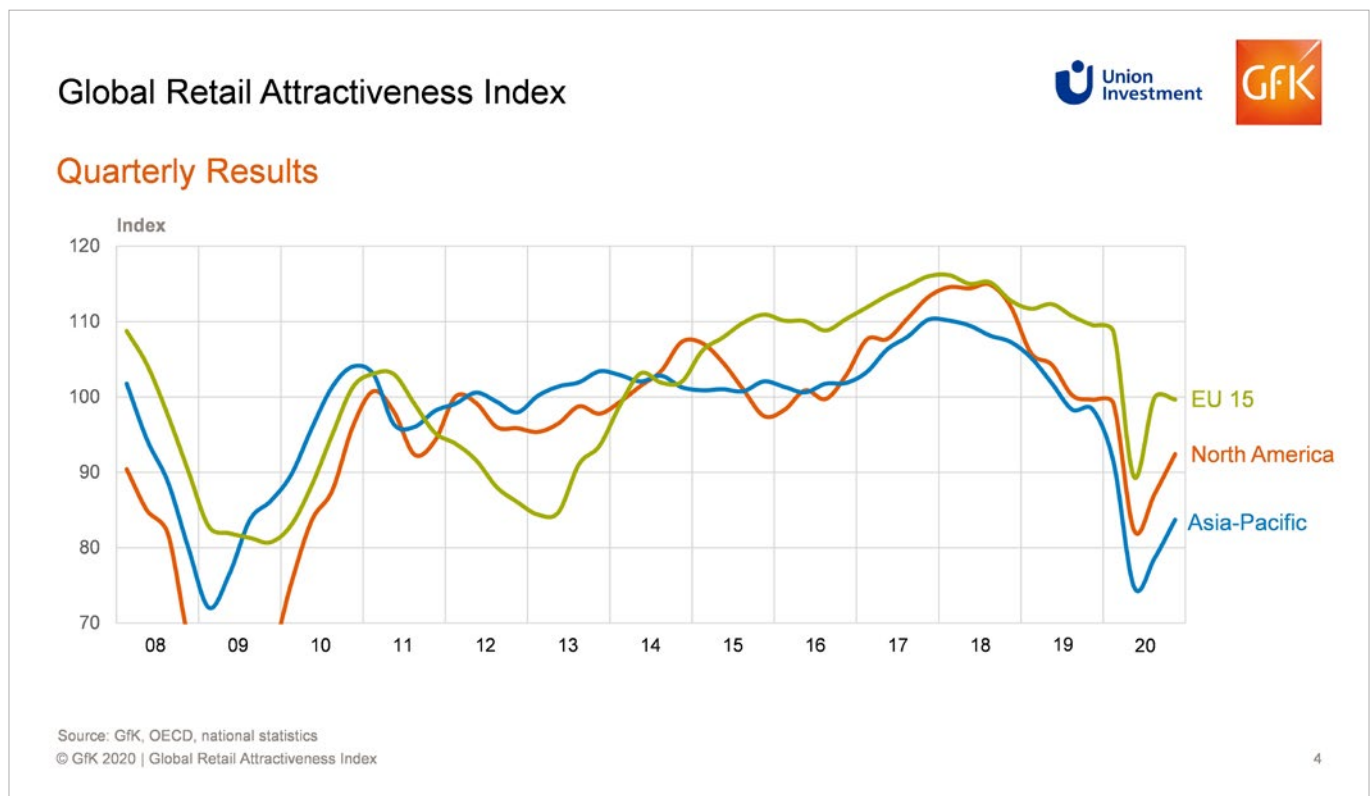


CROSSOVER CONCEPTS OFFER OPPORTUNITIES

“Transformation is in full swing,” said Henrike Waldburg. “The coronavirus crisis will amplify long-term trends and separate the wheat from the chaff, completely redefining which combination of retail property, retail concept and tenant structure will deserve the label ‘core’ in future. In the strong European markets that pass the crash test, there will also be opportunities for investors in the years ahead, however, including new crossover concepts that bring together retail and other exciting uses.”

EUROPE LEADS NORTH AMERICA LEADS ASIA-PACIFIC

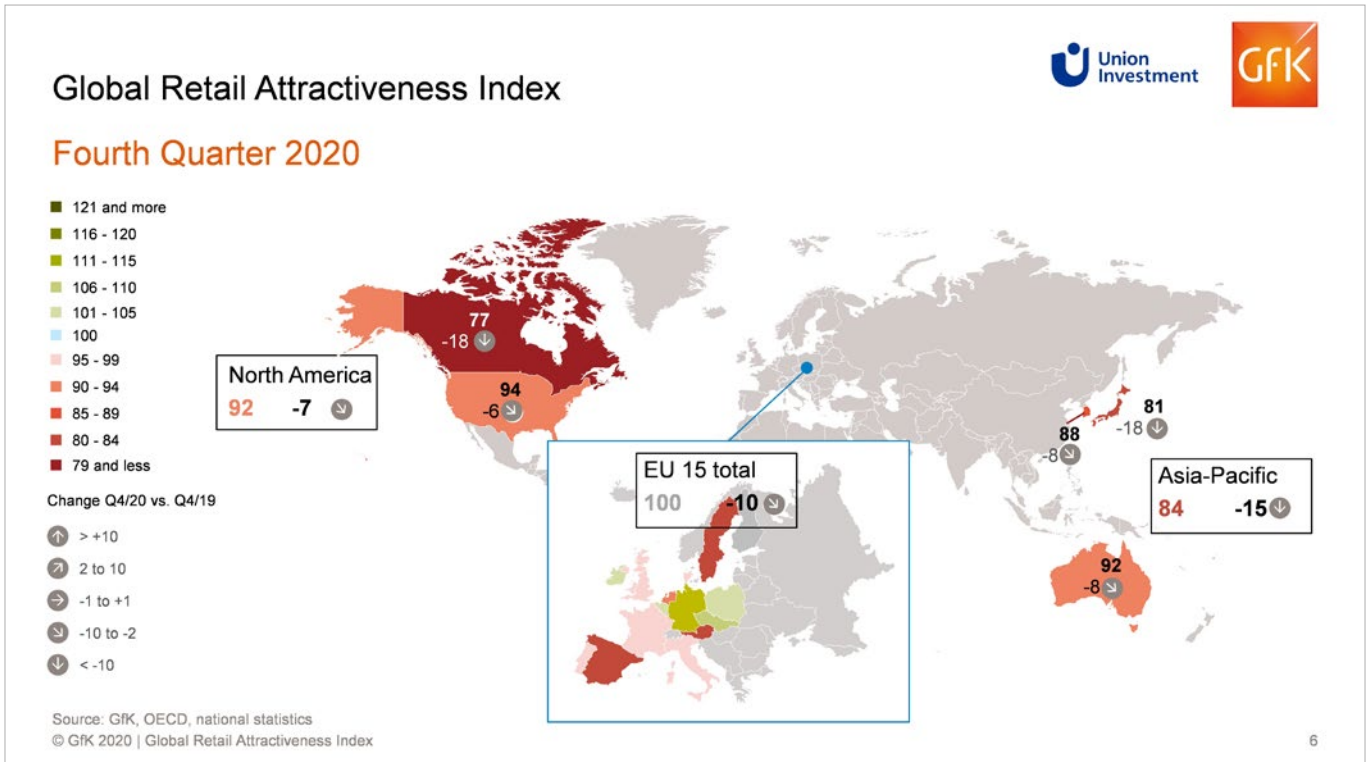
Overall, the European retail index (100 points) remains ahead of the international indices, both in North America (92 points) and in Asia-Pacific (84 points), where the global recession triggered by the pandemic is being felt much more strongly. Compared to Europe (minus ten points), the North America index losses are somewhat smaller (minus seven points). Supported by a strong rise in retailer sentiment, in the US the index suffered only moderate losses but nevertheless came in at a rather weak 94 points. The US was unable to compensate for the negative impact of Canada on the North America Index, with its northern neighbour losing 18 points compared to the previous year. In the fourth quarter of 2020, Canada was still the lowest ranked among all 20 countries covered by the GRAI, with just 77 points.



In the Asia-Pacific region, the GRAI recorded somewhat stronger losses than Europe and North America over the course of the year, totalling 15 points. Japan played a major role here, with all four indicators being down on the last

survey. The decline was especially marked with regard to labour market data and associated consumer sentiment.





METHODOLOGY

Union Investment's Global Retail Attractiveness Index (GRAI) measures the attractiveness of retail markets across a total of 20 countries in Europe, North America and the Asia-Pacific region. An index value of 100 points represents average performance. The EU-15 index combines the indexes for the following EU countries, weighted according to their respective population size: Denmark, Finland, Germany, France, Italy, Spain, Sweden, the United Kingdom, Austria, the Netherlands, Belgium, Ireland, Portugal, Poland and the Czech Republic. The North America index comprises the US and Canada, while the Asia-Pacific index covers Japan, South Korea and Australia.

Compiled every six months by market research company GfK, the Global Retail Attractiveness Index consists of two sentiment indicators and two data-based indicators. All four factors are weighted equally in the index, at 25 per cent each. The index reflects consumer confidence as well as business retail confidence. As quantitative input factors, the GRAI incorporates changes in the unemployment rate and retail sales performance (rolling 12 months). After standardisation and transformation, each input factor has an average value of 100 points and a possible value range of 0 to 200 points. The index is based on the latest data from GfK, the European Commission, the OECD, Trading Economics, Eurostat and the respective national statistical offices. The changes indicated refer to the corresponding prior-year period (Q4 2019).

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INSPIRING SURVEY RESULTS

Multi recently published its Pan European Customer Monitor + Covid-19 Survey. For Head of Research Mariam Hussain, the most positively surprising result was that 70% of visitors surveyed indicated that shopping centers are valuable places to spend time in and will continue to be especially once the pandemic is over.



ACROSS: WHAT MOTIVATED MULTI TO CONDUCT THIS SURVEY?

MARIAM HUSSAIN: This survey is part of an annual group-wide initiative to collect, analyze, and interpret local visitor data in our shopping centers in order for us to best adapt to the wants and needs of our customers. Completed in November 2020, this year's survey structure was adapted to provide insights on the impact of the Covid-19 pandemic on our shopping center visitors through primary data collection and analysis. Our confidence in the implementation of safety measures for shopping center operations, for which we were awarded the "Safe Guard" certification from Bureau Veritas in several assets, was supported by the survey results and reflected in customer responses.

Each year, the survey results are used as part of decision-making processes for different business functions, such as, for adding a new tenant, the redevelopment of projects including extensions and leasing approaches, and additional key decisions on shopping center operations. As an organization, this is a useful way in which we can constantly stay up to date with daily and long-term operation management across different locations and countries, whilst utilizing the information to provide high-quality and customer focused retail management.

ACROSS: IT'S A COMPREHENSIVE SURVEY: 33,000 VISITORS OF SHOPPING CENTERS ACROSS 11 COUNTRIES AND 50 RETAIL LOCATIONS. HOW DID YOU ORGANIZE THIS PROCESS?

HUSSAIN: Past experience in conducting pan-European on-site research was a key part in achieving the significant scale



IMAGE: MULTI

MARIAM HUSSAIN
Head of Research for Multi

of primary data collection and corresponding complexity of insights. The survey was organized across three different levels in our organization: Firstly, local center management, secondly, country level management, and thirdly, group level management at our headquarters in Amsterdam. The survey was designed in partnership with an external expert research partner, in order to maintain consistency and accuracy across different cultures and contexts. Virtual meetings to coordinate resources, such as representatives and tablets to conduct the survey on-site, took place simultaneously in all 50 locations from November 2 through 8, 2020. Our operations team's prior experience with leading the survey allowed them to easily mobilize staff and resources in a safe





way, whilst applying the necessary government restrictions, hygiene, and health standards. Inside shopping centers, visitors were able to complete the survey by tablet at a safe station (with hygiene and social distancing requirements), or on their personal devices. Results were collected at the asset level, filtered up to the country level, and then sent to the group level for final analysis and interpretation.

ACROSS: WHICH RESULT SURPRISED YOU MOST?

HUSSAIN: The most positively surprising result was that 70% of our visitors surveyed indicated that shopping centers are valuable places to spend time in and will continue to be especially once the Covid-19 pandemic is over. This was supported by 72% of respondents indicating that they are seeking an offline solution to reduce screen time, and more than 70% are optimistic about post Covid-19 shopping. These results were not something we took for granted and it is really great to see that our visitors continue to trust our shopping destinations. The emphasis the importance of shopping centers in a post Covid-19 world and further strengthens our belief in the future of retail.

ACROSS: WERE THERE ANY OTHER UNEXPECTED FINDINGS?

HUSSAIN: A second positively surprising result was that the shifts in shopping habits have changed substantially less than what we expected. 64% of respondents indicated that Covid-19 had significantly driven a shift in their shopping and eating out preferences. Given the scale of the pandemic, we were expecting this result to be much larger. Survey results reiterated that customer safety really goes hand in hand with this, as supported by the fact that 80% of visitors stated that they were satisfied with crowd control measures that were implemented.

ACROSS: WHICH ONE OF THE 11 COUNTRIES DISTINGUISHES ITSELF FROM THE OTHERS AND WHY?

HUSSAIN: Similar to the design and implementation of the survey itself, it is important to interpret responses with nuances for different countries, cities, and assets, to fully understand the results. One set of results that stood out to what we anticipated, came from our Italian retail assets in that survey responses were more moderate than other countries. We concluded that this was because our visitors in Italian shopping centers were more experienced with pandemic regulations in comparison to other countries, as residents in Italy were living with the crisis for longer. Differences also varied in the survey overall in terms of which questions were more polarizing than others, as illustrated by topics such as attending events and entertainment inside shopping centres in a post Covid-19 era.

ACROSS: HOW WILL MULTI DEAL WITH THE RESULTS RESP. WHAT WILL BE CHANGED OR IMPLEMENTED IN YOUR SHOPPING CENTERS?

HUSSAIN: The results of the survey are extremely important in helping us to provide high-quality, customer focused retail management and to improve our daily operational activities. This allows our local teams to annually benchmark our professional performance standards, whilst placing the visitor perspective at the core of our operations and utilizing research tools to improve our decision making. We need to be ready to give our visitors the best off-line experience that they are longing for.

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YOU CAN DOWNLOAD THE MULTI STUDY HERE



ACROSS RETAIL TALKS ONLINE, ON THE TOPIC “OUTLOOK 2021”

The ACROSS Advisory Board has its say. On February 25, the ACROSS Retail Talk on "Outlook 2021" took place. 16 members of the ACROSS Advisory Board discussed the expectations and perspectives of the placemaking industry in an exciting year. A large, prominent expert audience followed the online event.



It has been almost five years since the **ACROSS Advisory Board** was founded. Currently it has 22 members who identify the challenges the industry faces as well as the opportunities, emerging trends etc. Accordingly, it was only

natural to ask them for their expert opinion during the first ACROSS Retail Talk with the topic “Outlook 2021” on February 25 at 4 p.m. CET; of course, against the background of the Covid 19 crisis. 16 members accepted this invitation.

[Click here for VIDEO](#)





From Vienna, ACROSS Publisher Reinhard Winiwarter punctually welcomed the numerous participants and handed over to Klaus Striebich, Managing Director of RaRE Advise and himself a member of the ACROSS Advisory Board. Striebich informed the virtual audience – participation was free of charge, by the way – that they could ask questions via the chat function. This opportunity was frequently used.

IF YOU FAIL TO PREPARE YOU ARE PREPARING TO FAIL

The members of the ACROSS Advisory Board explained their key learnings from 2020. They reported what they could do better next time and what they certainly will not miss anymore. Against this background, Janner Tanner quoted Benjamin Franklin (1706 – 1790), one of the founding fathers of the USA, who had said: “If you fail to prepare you are preparing to fail.” According to Tanner, it is impor-

tant to be flexible and open-minded. Furthermore, he said, it is essential to strive to lift the spirits of both employees and customers. Scott Dwyer, on the other hand, said that it was and is important to present a united front to the outside world as an industry and to speak with one voice. Walter Seib emphasized that people are not made to be alone. In normal times, restaurants satisfy this need – and they will do so again. Apart from that, the CEO of HMSHost International sees the Covid 19 crisis as a kind of gift. “Thanks to it, the company is better prepared for a possible next crisis. Silvio Kirchmair also sees a positive side to the pandemic: his carbon footprint has been massively reduced due to the lack of air miles. He has learned that it is important to make decisions quickly, implement them swiftly, and follow through.

Further ACROSS Retail Talks on exciting, European topics are being planned. We will keep you up to date.

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SHOPPERS WANT APPOINTMENTS

BY CHARLES SMITH, IMAGE: BY APPOINTMENT



Our intention, as the Covid-19 lockdown in the UK began to be eased in June of last year, was to create an app to give confidence to retailers and shoppers as stores tentatively re-opened and shoppers re-emerged. The challenges for retailers at that point revolved around compliance with evolving government guidelines in each country, the required real-time capacity number management in stores, and the control of potentially chaotic queues on the sidewalks outside.

“By messaging the store in advance via the app, shoppers can ask to view or try on specific items in their sizes and preferred colors, thus giving them exactly what they want without wasting any time.”

“By Appointment”, a simple and free-for-shoppers app that lets people book appointments in stores, get in virtual lines, enter and leave stores with minimal contact using a personalized QR code, and communicate in-app with each store was our response to this unique scenario. Not only does it give shoppers confidence, but it also supports anxious store staff members in their effort to abide by government guidelines, manage capacity, and protect the health and safety of both customers and staff. As the situation developed, it became clear that shoppers did not only seek confidence in post-lockdown physical shopping, but, if they were to break away from their comfortable at-home online shopping, their brick-and-mortar experiences would need to be elevated, enhanced, personalized.



Charles Smith
Co-Founder of the “By Appointment” app, which represents 47 international brands and operates across 11 European countries

A retail revolution instigated by consumer preferences disrupting the sector has changed the way people shop and the way brands now operate. While omnichannel shopping has become the customer expectation, traditional retailers now need to maximize their physical presence, delivering engaging and educational experiences, using novel technology and futuristic creativity. To deliver such experiences successfully, data, as always, is king. With invaluable consumer insight, a retailer can deliver the ultimate omnichannel shopping experience. Adopting robust GDPR compliance, the “By Appointment” app offers data insights, with 56% of shoppers consenting to giving our brand partners their personal information.

The concept of enhanced shopping experiences driven by personalization is quickly becoming the new expectation and the future of physical retail. By messaging the store in





advance via our app, for example, shoppers can ask to view or try on specific items in their sizes and preferred colors, thus creating an optimized shopping trip that gives them exactly what they want without wasting any time. A shopper with an appointment is a shopper with intent. Retailers who use our app have reported exponentially increased conversion rates, brand engagement, and customer satisfaction.

It is a given that the role of the physical store will still be important despite the rise of online retail. Consumers will continue to visit physical stores for advice, to try out products, and to shop with friends. We have found that 87% of shoppers who use our app schedule an appointment rather than join a queue. They plan, on average, 4.8 hours

ahead of their appointments, creating a considered shopping schedule that includes breaks at cafés and bars as well as meals at restaurants, which maximizes their time.

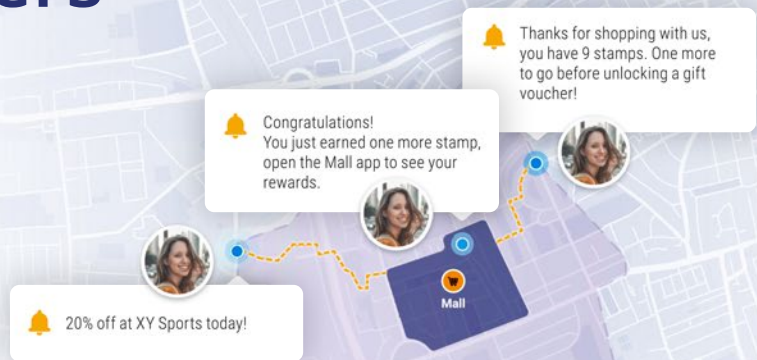
The shopping “day out” is more valued than ever, giving consumers the chance to safely spend quality time with friends and family while engaging with their favorite retail brands. Our “By Appointment” app delivers that enhanced experience, evolving today’s technology for tomorrow’s world.

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IF YOU CAN'T BEAT THEM, JOIN THEM

How rethinking real estate can transform brick and mortar into real dynamic platforms which again play a strong role within the omnichannel life.



BY CAROLINE VON WESTERHOLT, IMAGE: MARC PETER

The looming threat of possible vacancies within the retail sector, could be countered if we abandoned our rigid structures, our holding on to old real estate valuation patterns, and our immobile way of thinking. To date, the space of a property is still advertised in a very static manner. However, it would be more future oriented to market properties as dynamic platforms and as integral cooperating parts of omnichanneling. A great opportunity with regard to the modern retail cycle lies therein.

Whether it is a shopping center or a high street: In order to convince the fed up customers, to engage in physical shopping again, they are offered more and more additional experiences aiming to turn shopping into an experience once again. Expanded gastronomic offers, cinemas, indoor mini-golf, augmented reality, and wellness oases are just some of the wide range of add-on experiences. At some locations, new incentives do, in fact, seem to work; at many, however, after a short initial flow the impulse quickly wanes again. Leaving nothing but additional costs. According to retail marketing expert Rachel Shechtman: "It is not enough to have a roller coaster at your center, because six months later, someone else will have one, too, and then the question will be, 'Where is the new thing?'"

After their initial enthusiasm, customers quickly realize that the spicing up of locations with experiences or terms such as entertainment, luxury, etc. is nothing more than relabeling. What's missing out is the real change in structure. The change from a static point of sale into a dynamic brick and mortar as part of exciting omnichannel sales. And if a purely static point of sale is no longer enough to retain customers, what function do we have as retail locations and spac-



Caroline von Westerholt

Caroline von Westerholt has masters degree in real estate economics and is the Head of Strategy & Repositioning of Retail Real Estate at Twenty One Media GmbH (Germany). Prior to that, she spent nine years as Director of Development for Urban Districts at MAB Development GmbH and five years in Asset & Portfolio Management for Commercial Real Estate at Provinzial Versicherung.

es now and in the future? How can we evolve to become a real part of the dynamic digital retailing?

Whereas online retail used to support the physical store, today, it is increasingly the other way around, regardless of whether purchases are actually made in the store itself or ultimately online. The space has to increasingly serve as an additional marketing platform, as a stage for innovative





products and services in the context of omnichannel. That is true whether swings are hung from the ceiling or an in-store digital retail experience is used for marketing.

The brick-and-mortar store there within is the place in which customers can interact with the products (touch, handle, test) they have seen or heard of before digitally. Or the other way round. The mere real estate property itself is not the trendsetter. It's the vehicle for the user to promote his innovative trends. The tenant or user sets the trend and specifies the degree of innovation. Understanding the (retail) space as a dynamic marketing channel for tenants, which supports them in responding creatively and flexibly to the requirements of their customers, is essential. That is the real first step in the rethinking process, which creates added value for the tenant or user, thereby ultimately providing another reason to rent again.

THE MERE REAL ESTATE PROPERTY ITSELF IS NOT THE TRENDSETTER. IT'S THE VEHICLE FOR THE USER TO PROMOTE HIS INNOVATIVE TRENDS.

Therein lies the next big challenge. Who are the right tenants, users, or cooperation partners for my space? How do I find those tenants, and how can I make myself stand out? What real added value does my space offer compared to my competitors, and can I make my space even more attractive and dynamic for potential tenants through the use of technology and advertising or marketing cooperations? The answer lies in B2B in its purest form, but rethought and from a new dynamic performance perspective.

The retail property and, therefore, those involved in it will see themselves as dynamic marketing channels for the users, supporting them in responding creatively and flexibly to customer requests, digital requirements, or user changes. Taking a new look at a property from a dynamic perspective almost makes it "moveable".

WHY IS SUCH A SHIFT TOWARDS MORE FLEXIBILITY SO DIFFICULT FOR US? WHY IS A SHIFT IN THINKING FROM SOLID WALLS TO

"SPACE AS A TRANS-FORMATIVE MARKETING CHANNEL" SO CHALLENGING?

The need to think of space in flexible or mobile terms and, most importantly, to be able to quickly adapt it to new requirements runs counter to the way real estate has been perceived up to now. How does real estate as a marketing platform with ever more rapidly changing tenants and requirements fit into a system in which the value of a property is based on the remaining terms of existing leases? Should rental rates be based on local sales or turnover rents, and will incentives to shop online be created locally in the future? Will municipalities, in whose city centers (at least in Germany) assortments are specified to the square meter, make such tenant or assortment flexibility possible? Moreover, if retail space in the future is much more of a flexible marketing space, with dynamically changing products and tenants, how will we as location branders change our marketing activities in the future? What exactly will we market and to whom?

ONCE YOU HAVE REALLY ACCEPTED THAT YOU CAN'T BEAT SOMETHING, YOU FINALLY SET YOUR POWER FREE TO JOIN AND BECOME SOMETHING BIG WITHIN THE NEW

One thing is for sure: It will involve a lot of work to develop new structures, new technology, new tenants, and new ways of marketing ourselves. However, it is also certain that reimagining the retail space as a dynamic marketing platform will create a sustainable opportunity for the brick-and-mortar space to once again play a leading role in the digital marketing age. Once you have really accepted that you can't beat something, you finally set your power free to join and become something big within the new. The winners will be those who courageously question themselves, accept confidently their new important role and enter into new cooperations not fearing to change old structures. The next few years will be incredibly exciting for the retail real estate world and should also prove to be very prosperous.



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DEVELOPING OUR MARKETPLACE OFFERING

PROPTech COLUMN BY PETER TONSTAD, IMAGE: PLACWISE GROUP



At the time of writing this, we are still in the midst of closed and restricted shopping centers. Currently approximately 20 percent of our more than 1.000 shopping center clients globally are restricted to essential shopping only. In my home country Norway, we experienced closed shopping centers for the first time during the Pandemic now, in February 2021. It was the mutant versions of the virus that brought things to a new level of caution and restrictions in parts of the country. The short-term results have been that the centers located in neighboring towns to centers that have had to close have been flooded with visitors happily driving an extra hour to shop. You can take the shopping center away from the shopper, but not the desire or need to shop.

Looking into high level stats across our client databases comparing Q2 and Q4 2020 with the same quarters in 2019 we see the following changes in average monthly consumer activity levels (app or web) in some example markets:

	Q2 2020 VS Q2 2019	Q4 2020 VS Q4 2019
USA	-24 % (June +8 %)	-29 %
Spain	-54 %	-13 % (December +6 %)
Sweden	-27 %	-57 %
Norway	+8,2 % (March -29 %)	+21 %

The use of client databases in recent months has been weighted more towards service information on opening hours and Covid-19 measures, against the more normal offers and benefits. Many have also been able to keep their shoppers engaged through periods of closures with digital activities like games and competitions.



PETER TONSTAD

CEO of Placeswise Group and Member of the ACROSS Advisory Board

Some closed centers have gone as far as to offer free home delivery of all orders from any of the stores in the center. We chose to see these kinds of offerings as further steps towards the evolving convergence between malls as physical and digital marketplaces.

As part of developing our marketplace offering, we have recently spent a lot of time talking to retailers about product feed integrations for our clients. The response has been overwhelmingly positive. Retailers on average seem very happy that shopping centers are going down the path of fully serving them in the digital channels as they are doing in the physical space. It adds a new dimension to the long-





term perspective of the tenant and landlord relationship which has been sought after for some time. For some retailers we also see the new shopping center offering, potentially replacing other industry initiatives for vertical online marketplaces or direct retailer investments in their own platforms.

THE OVERALL REASONS FOR TENANTS TO BE A PART OF SHOPPING CENTERS DIGITAL MARKETPLACES ARE:

- 1) Provides very cost-effective product and offering visibility directly to the local catchment area in all relevant digital channels
- 2) Makes last mile delivery and new customer acquisition more cost efficient
- 3) Gives customers more fulfilment options and greater convenience
- 4) Improved BOPIS, BOPAC, and delivery experience—better than most retail tenants could provide individually
- 5) Sell more online and in store

In our marketplace discussions in general we also see a big difference in traction from owners and tenants if the shopping center already has a big consumer database.

The prospect of further capitalizing on an existing consumer database, by connecting it to a marketplace, is an easier next step than starting from scratch. This confirms the importance of a shopping center having a consumer database in the first place. It should be regarded as an asset that will allow the center to evolve and grow in different directions to the benefit of their tenants. We believe building the biggest possible consumer database should be a top strategic priority for any physical retail location. Launching a shopping center branded marketplace will benefit substantially from any existing consumer database, but it will also help build one for centers who yet haven't gone down the digital offering path.

“Retailers on average seem very happy that shopping centers are going down the path of fully serving them in the digital channels as they are doing in the physical space.”

The pandemic continues to drive digital convergence in the industry at a faster phase than before, and we can't wait to see all the long-lasting effects when we come out on the other end.

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“THERE IS NO PLAYBOOK FOR THIS SITUATION”

The most difficult part of business is making decisions during a crisis, explains Walter Seib, CEO of HMSHost International, with regard to the Covid-19 pandemic. He believes that as countries open up and vaccines become available, people will travel and return to airport F&B.



ACROSS: HOW HAS HMSHOST INTERNATIONAL'S BUSINESS IN EUROPE BEEN AFFECTED BY THE COVID-19 CRISIS?

WALTER SEIB: The degree to which coronavirus has impacted our industry, and our world, is simply unprecedented. Nearly every person has felt the impact, people have lost loved ones, society has changed, and the world is not as we knew it. HMSHost International sits at the crossroads of the food & beverage and travel industries as around 85% of our business comes from our operations at airports, and, in that sense, we have been doubly hit. We have felt the coronavirus move across our 19 countries with differing timelines and intensities – each one experiencing a drastic drop in travel. People have just stopped moving.

In January 2020, we felt the first tremors of the coronavirus through our operations in China, and the next four months triggered the temporary closure of nearly all of our stores across the world. At some point in March, our revenue dropped to 1.5%, and, as our CFO says, ‘No modelling exists for this situation’. As a company, we quickly recognized that the journey to recovery was long-haul, not short-haul, and we saw that we needed to change the way we did business. You could say that the coronavirus accelerated our restructuring; we have become lean and agile, we have shortened decision lines, and we have positioned the company to be ready to scale when recovery comes.

During the crisis we held onto two anchors: preserving cash and preserving the safety and stability of our associates. We left no stone unturned: we tapped into government tax incentives and wage relief programs when renegotiating con-



IMAGE: HMSHOST INTERNATIONAL

WALTER SEIB

CEO of HMSHost International and Member of the ACROSS Advisory Board

tracts with landlords, business partners, and suppliers, looking again at our business from both ends to see where we could generate savings. I remain enormously grateful to our network of stakeholders; as part of the industry, we are in the same situation, and it is only through working together – during the good times and the bad – that we are able to keep going. At the same time, we looked to innovation; we created and launched our new ‘Your Order Please’ digital ordering system, we delivered more than 50,000 successful e-learning modules, we extended one of our most important airport contracts, we tested new service models for our brands, and we opened exciting new stores.





ACROSS: WHAT WAS THE MOST DIFFICULT PART?

SEIB: The most difficult part of business, for any business, is making decisions during a crisis. For this particular crisis, there was no playbook, no precedence. ‘Tough situations call for tough decisions and tough leaders.’ With the world drawing to a standstill our working capacity shrank significantly, and we needed to reduce overheads in all our countries. We lost more than 6,000 associates over that period of time – good people, passionate people, talented people – through no fault of their own. That was one of the most difficult parts of our journey, which pains me to this day. That is why we continue to do everything we can to preserve as many jobs as possible.

Through all the turmoil, our associates have been incredible. They have illustrated to me, and to the leaders of our company, the value of working together and their commitment to finding a way through this crisis. Whether working in our stores, working from home, volunteering their time with local charities, or finding ways to support the business while their stores are closed, they have remained loyal to the company. We have kept communication lines open and transparent, asking our people to share their ideas on how we can preserve cash and preserve the safety and security of our associates.

While the coronavirus is in every sense unprecedented, we remain hopeful and optimistic about the future. As a company, we met the challenges presented by September 11, the Global Financial Crisis, and the ash clouds of Iceland’s Eyjafjallajökull volcano – each time emerging stronger than before. We learn, we strengthen our relationships, and we build new ones; and while we do not know when recovery will come, when it does, we will be ready to scale with it.

ACROSS: TO WHAT EXTENT ARE YOUR CUSTOMERS RETURNING? ARE THERE DIFFERENCES AMONG THE COUNTRIES IN WHICH YOU ARE ACTIVE?

SEIB: While we saw positive signs over the European Summer of flights picking up, with the second wave even stronger than before in some cases, the experts have revised their outlook. For HMSHost International, we expect to see some consistency in increased traveling by the end of Q1 next year. We believe that as countries open up, vaccines become available, and travel becomes possible, people will travel and will return to airport F&B. The signs are strong: In China, domestic travel is at an even higher rate than 2019,

and in Europe, we see the same or increased penetration and average cheque among travelers.

I believe that, for many travelers, the opportunity to travel again – whether for family-related reasons, business, or pleasure – will present such an enhanced sense of ‘carpe diem’ that their journeys will ‘begin’ at the airport, and they will take pleasure in spending time at our stores. That sense has been met with genuine enthusiasm from our people. Our associates live and breathe hospitality, making our stores more than pitstops, but places to be, and they are also hopeful about the return of travel.

ACROSS: WHAT SAFETY PRECAUTIONS HAS HMSHOST INTERNATIONAL HAD TO IMPLEMENT FOR ITS CUSTOMERS? HOW MUCH MONEY HAS BEEN INVESTED IN THOSE MEASURES?

SEIB: As a global operator during the coronavirus crisis, a time in which every country has had its own changing set of measures and support schemes, we have had to embody that familiar phrase, ‘think global, act local’. We have divided work across our regions and country offices, focusing our global office on strategy and our local teams on cash flow and operations. We have tailored our global signage and training to include local context. We have reviewed our operations, kitchen flow, and offering, improving the safety of our back of house and reducing touchpoints for our guests.

A common goal that we share with our landlords and business partners is to work together in creating an environment that implements local safety measures while conveying a sense of safety for our associates and guests alike. A great example is one of our café’s in New Zealand, which was asked to remain open by the local airport authority in order to meet repatriated New Zealanders. Our incredible team stepped up in the face of uncertainty and took pleasure in welcoming returning New Zealanders while the rest of the country was in lockdown.

ACROSS: WHEN DO YOU EXPECT THE SITUATION NORMALIZE?

SEIB: A lot of people have asked that question, and I always tell them the same thing: I do not have a crystal ball. Nobody does. The coronavirus has been a total game changer, and the whole world is still scrambling for a playbook. Will things ever really return to the way they were before? I do not have all the answers. I can tell you, however, that I strongly believe



INTERVIEW



that we are in a business that is future proof, and recovery will come to travel. Most importantly, this crisis has shown me that human beings were not created to be alone. Wherever you are in the world, whatever you are contributing to business or society, you have to keep those around you in mind. Take time to reach out and check in – to support one another. The only way through the coronavirus crisis is by working together and taking care of the people around you.

ACROSS: DO YOU HAVE ANY ADVICE FOR OTHER ENTREPRENEURS WITH REGARD TO THE LATEST TRICKS AND IDEAS OR PRACTICAL SOLUTIONS FOR OPERATING RIGHT NOW?

SEIB: As I have mentioned before, there is no playbook for this situation, but there are a few tips and tricks that I have picked up along the way. Firstly, look at the details of your business. Consider reducing menus, or the complexity of menus, and the operating hours. Investigate cashless options and how you can minimize the number of touchpoints for your guests. Our ‘Your Order Please’ platform has been

accelerated by the coronavirus and presents advantages for our landlords globally. Secondly, do not take anything for granted. Take another look at your business to pinpoint efficiencies and areas of improvement, and work on those things. Consider the fact that the crisis has impacted the entire length of the value chain, and understand the value in working together with our suppliers to support each other at this time. Re-examine fixed costs in your P&L, and open up discussions with stakeholders on changes to the business cases that guided the original agreements. Thirdly, and most importantly, be honest and transparent with your associates, works councils, stakeholders, business partners, landlords, and all parties involved. The truth is that, while it may not always be easy and pleasant, it is appreciated and respected. If you have hidden agendas, trust and respect will be lost, and once those things have been lost, they will be nearly impossible to regain. I would just like to conclude with one of my most frequently used sayings: ‘The road to success is always under construction.’

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FUTURE RETAIL AT OUTLETCITY METZINGEN

The designer outlet in the German state of Baden-Württemberg takes shopping to the next level across all channels. Managing Director René Kamm presents Outlet 3.0.



At Europe’s largest designer outlet*, Outletcity Metzinger, which is located in the city of Metzinger in the German state of Baden-Württemberg, digitalization is successfully making headway. In 2012, the location launched its own on-line store and was engaged in pioneering activities in the outlet business – even back then. Today, the cornerstone of the omnichannel strategy is comprised of roughly 300 premium and luxury brands and has ensured that it has had an open sales channel even during periods of shutdown.

René Kamm, who has more than 30 years of experience working in management positions at companies such as Unilever, Tag Heuer, and MCH Group in Switzerland, has been the Managing Director of Outletcity Metzinger since March 2020 and describes the shopping destination’s concept for success as follows: “As the world’s only outlet that offers an online store, we have been able to work with external partners to develop an innovative concept that makes future retail tools and omnichannel features possible for the first time in the outlet industry.”

“CITY FIBER BACKBONE” AS THE FOUNDATION

Using the latest technology emerging from the “Future Retail” sector, Outletcity Metzinger has taken the connection of brick-and-mortar retail to online stores and other digital platforms to the next level. The foundation of many digital initiatives is excellent infrastructure. To that end, Holy AG, the operator, has recently invested in new and comprehensive fiber-optic infrastructure, the so-called “City Fiber Backbone”, which provides capacity for future standards, such as 5G. In addition, a state-of-the-art Wi-Fi network is available in all stores, in all open areas, in parking struc-



IMAGE: OUTLETCITY METZINGEN

René Kamm
Managing Director of Outletcity Metzinger

tures and underground parking garages, as well as in restaurants and cafés. Guests, of course, are able to access “Outletcity freeWIFI” free of charge. The Wi-Fi network also enables the optimum use of relevant tools, such as the “Mobile Check-In” function, which was developed in-house. That function, in particular, has proven to be especially useful during high-traffic periods, such as Black Friday. The application allows visitors to use their smartphones to virtually check themselves in to a queue in front of the stores they want to go to via a QR code, thereby enabling them to use the waiting time to shop for other items or take a coffee break. It helps keep queue formation to a minimum and,





in combination with the mandatory use of masks and standard hygiene measures, is an essential part of Outletcity Metzingen's health and safety concept.

A prerequisite and essential component of "Mobile Check-In" is sensalytics, a people-counting system provided by tectuality GmbH. All facilities and outdoor areas have been equipped with sensors in order to be able to evaluate, in real time, how many guests are on the premises at any given time. It goes without saying that the evaluations are carried out in accordance with the highest GDPR-compliant data protection standards. In addition to the strategic and operational control of operations, sensalytics' web interfaces enable the implementation of additional services that make essential contributions to the execution of and compliance with coronavirus guidelines. All stores, for example, use an app that displays the current number of people allowed inside each store at a time as well as the real-time capacity of each store, thereby ensuring that entry can be regulated in a timely manner during periods of high visitor footfall.

The "Virtual Shopping" feature has also helped to digitally facilitate the on-site shopping experience during this period of the coronavirus pandemic. It is carried out with the help of the "Outletcity WhatsApp Service". Some of the most popular premium and luxury brands are on hand to assist guests with product inquiries, help them find the items they want, and even send them to their homes if desired. Those who wish to take advantage of exclusive on-site consultancy can simply use the tool to book their preferred appointments at the respective stores.

Another important service available to visitors is the "Outletcity App" for Android and iOS, which provides information about the location of each brand, vacant parking spaces, service options, and current offers, both before and during their stay. As part of the ongoing digitalization process, shopping passes that offer additional discounts, which were previously paper-based, can now be digitally activated directly via the app. The app can also be used to register for the "Outletcity Club", which offers guests special discounts in the form of coupons and allows them to collect points for each purchase. The points can be re-

deemed for special rewards, and they enable customers to achieve Gold status, which includes further benefits, such as free parking.

CUSTOMER JOURNEY ON2OFF2ONLINE

Digital tools are also being used more frequently within the stores themselves to improve customer satisfaction. For example, guests are able to visit outletcity.com to take a detailed look at the available items in the Calvin Klein and Tommy Hilfiger mega-stores and to get a bit of inspiration before or during their journey to Metzingen. For the first time, customers are able to take a virtual look inside those stores. In order to enable this, the inventory data of both stores is updated on a regular basis on the Outletcity Metzingen website. Visitors to the Calvin Klein and Tommy Hilfiger stores can expect to find digital screens featuring tools such as the Denim Fit Guide and the Style Scanner. Is it possible to find the right style of jeans, find the right size, and create the perfect look using the Style Scanner? Absolutely! If the desired item is not in stock at the store or if you simply prefer to try something on at home, you can have it conveniently sent to your home address. All Outletcity Online Shop customers have to do is scan the QR codes generated on site with their mobile devices. Then, they are directly routed to the product detail page of the item in the Outletcity Online Shop, where they can continue shopping. With one click, the desired item is ordered via invoice, for example, and delivered to the customer's home. "The lines between the two worlds of online and offline in the retail industry are becoming increasingly blurred," concludes Kamm.

On Thursday, Sep. 2, 2021, René Kamm is scheduled to present Outlet 3.0 at the Shopping Center Forum Switzerland in Zurich, under the Megatrend 2025 umbrella. More info: www.sc-forum.ch

*By sales area or size, according to the "Outlet Centers in Europe" market report, pg. 25 (December 2020), issued by ecostra GmbH, www.ecostrade/studien_und_marktberichte/outlet-centres-europe_2020-12.pdf

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ALLOWING YOUNG TALENTS TO COMPLETELY RETHINK RETAIL

Union Investment and Sierra Germany launched their latest edition of First Store by Alexa—a campaign by Berlin’s well-known shopping center Alexa. Ralf Schaffuss, Head of Retail Asset Management of owner Union Investment Real Estate, and Jens Horeis, General Manager of Center Management company Sierra Germany, talk about their latest innovation of the competition.



IMAGE: UNION INVESTMENT

Ralf Schaffuss

Head of Retail Asset Management at Union Investment Real Estate



IMAGE: SIERRA GERMANY

Jens Horeis

General Manager of Sierra Germany



ACROSS: FIRST THINGS FIRST—WHAT IS FIRST STORE BY ALEXA?

JENS HOREIS: In its original sense First Store by Alexa is a retail casting for newcomers and start-ups that don’t have a store yet to try out new concepts in our retail world. They can win retail space right at the hot spot of Berlin – the Alexanderplatz. In this case in the shopping center Alexa.

ACROSS: WHY DID YOU CHOOSE THE SHOPPING CENTER ALEXA?

HOREIS: Well, when we started in 2017 the basic idea of such a competition was not completely new. But, to be

honest, every time it was played the real purpose behind it was to try to fill empty retail space at locations that had trouble leasing their vacant units. And our real innovation was to turn this upside down and choose one of the best centers in Germany.

RALF SCHAFFUS: I think this is the decisive factor. When you want to support or drive innovation you need to invest in the future. And our investment is to offer the best in





class—a top store location in the heart of this mall. Just like the claim says: Alexa, Alexanderplatz Berlin—Where else!

ACROSS: IN THIS THIRD EDITION OF FIRST STORE, YOU HAVE CHANGED THE CONCEPT. WHAT DID YOU DO?

HOREIS: As you well know the challenges for our industry are growing. Therefore, we always need to re-think how we do things. So, after two editions as an open competition for newcomers we decided to start one stage earlier in the process and formed a cooperation with Deutsche Pop Academy. First Store will be open exclusively to students of this creative academy and it will take place at 12 locations in Germany, as well as in Vienna and Amsterdam. The jury will get together in April and in June, the winner team will play out its concept for six weeks at Alexa.

ACROSS: AND WHAT IS THE MAIN DIFFERENCE IN THIS EDITION OF FIRST STORE?

HOREIS: The competition will allow these young talents to completely rethink retail, with the aim to promote innovative ideas and concepts in shopping centers. Everything and anything is on the cards; from the store to catering, service to event location.

SCHAFFUS: The students will have an opportunity to help shape the future of retail for their generation. Maintaining a top position in the retail industry means constantly seeking out new paths, identify our strengths and provide customers with what they are looking for. And if we want to create something new, we should never forget to include the target group that makes up a large share of our visitors.

ACROSS: HOW DID YOU FIND YOUR PARTNER AND WHY DEUTSCHE POP?

SCHAFFUS: Sonae Sierra actually presented the basic idea about a year ago and we liked it right away. And then they looked for a matching partner. The Alexa center has always been innovative; and the creative, popular courses offered by the Deutsche Pop academy have the finger on the pulse, too. I am very excited, also speaking as a member of the jury, to see what ideas the students come up with.

HOREIS: On top Deutsche Pop is a perfect match for our target group at Alexa. It brings in an international compo-

nent which fits to this mall being located at Berlin Alexanderplatz. And Deutsche Pop sees that as well. They like to teach from practice for practice and place great importance on collaborating with the industry. The First Store cooperation fully reflects the Deutsche Pop mindset.

SCHAFFUS: ...it's what we need—two strong brands that inspire one another.

ACROSS: IS THAT WHAT MAKES IT SO SPECIAL OR IMPORTANT?

SCHAFFUS: I really think this is an important point. If we like to shape the future, it's important that we create a founding spirit in where we leave our normal roots. One way to do this is to form a partnership with somebody from a completely different industry. It will challenge both sides in a positive way and hopefully start a creative process.

HOREIS: ...and I like to add another element, because at the same time we have the opportunity to create an interest in our industry, to motivate young talent to join our working environment.

ACROSS: WHAT ARE YOUR EXPECTATIONS?

HOREIS: The natural first reaction would probably be to expect the winner's new concept for retail space to blow your mind. But I actually think this is misjudging and underestimating how the evolutionary innovation process works. Of course, it would be fantastic if the outcome is like I just described, but I want us not only to look for answers but also to be aware of the questions that we will be asked or that arise during the process. Often the little changes or new impulses that start a train of thought make a big difference.

SCHAFFUS: Actually, I like to underline what Mr. Horeis just said with a quote from Franz Kafka, which just struck my mind, not because of my immense knowledge in literature, but as it's on this year's Christmas card of Union Investment. He said: "Paths emerge by walking them."



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THE PANDEMIC'S LASTING IMPACT ON RETAIL REAL ESTATE



BY ULF SMEDBERG, IMAGE: INGKA CENTRES

It is too early to tell what lasting impact Covid-19 will have on how people choose to visit and spend time at shopping centers in the future. However, despite the uncertainty, some signs and trends have emerged that we know our industry will need to adjust to.

“In our survey, many of our visitors told us that they would like to continue to see features that minimize the spread of infections, such as touch-free shopping, and that will be at the forefront of our minds as we upgrade our centers and embark on new projects.”

In order to help us adapt our business and support our customers, partners, and communities, we conducted a survey in November. In all, 5,200 visitors across 20 of our shopping centers in different markets participated in the survey, and we are confident that the results will help us understand how Ingka Centres' visitors' shopping behaviors and interaction with our centers have changed as a result of Covid-19. The survey looked at online shopping trends and how spending has shifted in different categories since the onset of the pandemic. It also identified the core reasons why people visit our shopping centers today and what will drive them to visit post-pandemic.

The findings have shed new light on what we can expect to see in terms of customer journeys, behavior, and demand,



Ulf Smedberg
Global Marketing Customer
Concept Manager at Ingka Centres

and will be valuable with regard to how we adapt, innovate, and continue to transform our business for the future. Reassuringly, the research also confirmed—as we have predicted—that Covid-19 has simply accelerated many of the trends our industry was already adjusting to. Those of us who have long aligned our business towards those trends should take comfort from that and may even benefit from changed consumer behavior in the world of the so-called “new normal”.

For example, the pandemic has, unsurprisingly, led to an increase in online shopping as people have been forced to stay at home—and that is likely to be a lasting trend. Our customers say they are more likely to shop online in the future, with every second customer in Russia, China, and Sweden confirming the same. However, with that comes opportunity. In 2020, we launched Livat Online at our Chinese shopping centers. It is a new online community





that brings visitors and partners together for shopping, lifestyle, and conversation. It is helping us and our partners get closer to visitors by leveraging data to deliver personalized experiences and build stronger connections to drive traffic to both online and offline stores.

Ingka Centres wants to connect visitors and our partners via both digital as well as physical experiences. Entertainment and education are two leisure-focused categories in which the shift toward online usage is predicted to grow. That, however, also creates opportunities for forward thinking operators of physical space. Physical and digital experiences will be mixed. More immersive digital events will occur that will require increasingly sophisticated equipment. Consider online gaming, where physical space plays an increasingly important role as people may not have the equipment to play at home, or simply want to gather with others to play.

Our survey results found those most affected by lockdowns are actually more eager to return and socialize. Around half of our customers in China and Russia, and slightly fewer in Poland said they planned to visit shopping centers more frequently in the future. Citing reasons such as parent-child entertainment, restaurants, cinemas, and concerts, in addition to shopping, for example. Nearly half of our customers also plan to visit shopping centers in the future for different reasons, with spending general “leisure time” serving as the main reason to visit—over “shopping”. In China, the top reason our customers visit our Meeting Places is to have a meal, while in Sweden, half said they come for a fun day out. That is further evidence that our industry’s ability to create truly mixed-use destinations that go far beyond shopping is the key to a successful future.

As we look forward, we must also consider safety. It is at the top of consumer minds—like never before—and Covid-19 has rightly drawn more attention to hygiene standards of

all kinds at shopping centers. As our Meeting Places fully re-open, they will have to operate in a different way to before. A focus on cleanliness and safety will continue— that is essential for maintaining the trust our visitors and partners have placed in us. In our survey, many of our visitors told us that they would like to continue to see features that minimize the spread of infections, such as touch-free shopping, and that will be at the forefront of our minds as we upgrade our centers and embark on new projects. People’s desire to stay safe has also led to them shopping and spending their leisure time closer to home. That is something that has also accelerated trends we were seeing pre-Covid, such as an increased demand for convenience. That is why we are creating smaller format IKEA-anchored Meeting Places in urban locations that will be situated in the heart of their communities. Our goal is to create community destinations in which people can spend time with their friends and family, and have better everyday lives by having easy access to wellbeing, a sustainable lifestyle, and, of course, a feeling of safety.

Although there are many positives to take away from our survey, there are, of course, challenges our industry will need to overcome as we emerge from Covid-19. For the foreseeable future, people will have less money in their pockets and will likely cut back on things such as leisure, restaurants, and fashion. However, if there is anything good that has come out of all of this, it is that it has reminded all of us about what is important—family, friends, community, and free time. Humans are social creatures: We are at our best when we are together. We will continue to develop our destinations for the masses.

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MADISON AVENUE TAPS CONIQ TO DESIGN UNIQUE SHOPPER LOYALTY PROGRAM

Madison Avenue Business Improvement District to launch its Exclusive “Only On Madison” customer loyalty program in May 2021.



Coniq announced that the Madison Avenue Business Improvement District (BID) has selected its innovative real-time customer engagement solution, IQ Connect, to provide a new loyalty-driven shopping experience designed to increase store visits, reward transactions, boost sales and entice thousands of visitors to New York’s premier destination for luxury retail, Madison Avenue on the Upper East Side.

Since its debut in November 2020, IQ Connect has quickly become one of the most popular smart loyalty apps developed to give retail destinations the ability to communicate with clients more directly, and thus drastically improve and increase customer engagement and spend in stores.

“We are constantly looking at new ways to help our retailers, shops, restaurants and other local businesses connect with, and acquire new customers,” said Matthew Bauer, President at Madison Avenue Business Improvement District. “Coniq’s innovative loyalty app enables us to reward people for shopping, dining and utilizing the personal services establishments on Madison Avenue, as well as deliver personalized experiences that encourage visits and increased spend.”

To be launched in May 2021, developed exclusively for Madison Avenue, the “Only on Madison” loyalty program



IMAGE: CONIQ

Ben Chesser

Founder and CEO of Coniq and Member of the ACROSS Advisory Board

will encourage visitors and residents to become more engaged in the Avenue’s community, and get people to continue to spend more time and money in participating stores and businesses while increasing the effectiveness of the BID’s event marketing activities.





“We chose Coniq because they have developed a quick, ready-to-deploy digital platform that gives us the capabilities to effectively curate and deliver a unique shopping experience for individual residents, tourists and employees that builds loyalty,” added Matthew Bauer, President at Madison Avenue Business Improvement District.

Coniq will provide Madison Avenue BID with a single digital platform to create, manage and track the performance of its multichannel customer engagement and loyalty program. Clients joining the program will receive personalized communications to encourage them to visit and spend in local stores, restaurants and attractions. When they buy, customers will be rewarded. They will also continue to receive highly relevant communications and offers – all the while earning currency for future rewards such as invitations to special VIP events.

“We look forward to working with Madison Avenue BID to design and launch what is expected to be one of the retail industry’s leading loyalty programs,” said Ben Chesser, CEO of Coniq. “By leveraging data to create personalized customer experiences, retailers on Madison Avenue will witness higher levels of visits, sales and engagement than before.”

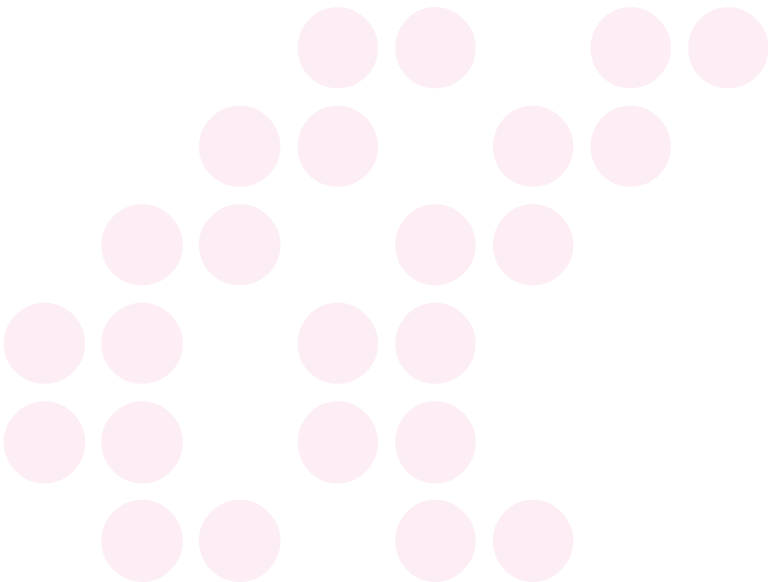
With IQ Connect, organizations are now able to identify and communicate with customers throughout the entire shopping journey without the cost and maintenance of additional hardware in stores or any complex integrations with retailers.

ABOUT MADISON AVENUE BUSINESS IMPROVEMENT DISTRICT

Madison Avenue Business Improvement District is a public-private partnership established in 1996, with the goal of enhancing the quality of life for the community and its visitors. The 60-86 Madison Avenue District Management Association (DMA), a not-for-profit corporation, is under contract with the City of New York to manage the BID and supplement services to the community.

The BID extends from East 57th Street to East 86th Street on Madison Avenue, as well as the commercial areas of its adjacent side streets. The district includes approximately 250 buildings and 800 businesses, and features some of the world’s most celebrated boutiques, restaurants, hotels, galleries and residences. For more information, visit <https://madisonavenuebid.org>.

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VACANT RETAIL SPACES AS INSTAGRAMMABLE EXPERIENCES

Although empty shop windows have always been part of running a shopping center, there are more around than most center managers might like. The good news is that they are opportunities to create bite-sized experiences that support the trend towards “shoppertainment”.



It looks like humanity has turned a corner. As the number of people being vaccinated increases, cautious optimism is taking hold. There is no denying, however, that the shopping center industry has been hit hard by the lockdowns and the results are becoming increasingly visible in the form of vacant retail spaces. Although some centers may despair at the higher-than-normal numbers of empty shop windows, others are spotting an opportunity to morph from shopping centers to “shoppertainment” centers.

Frankfurt’s MyZeil is a good example of how this works. The popular center saw an increase in footfall and online visibility when they transformed a vacant retail space into an Instagrammable Christmas grotto in 2020—complete with fireplace and Santa’s chair. Children and families could pose for festive photos, and the experiential space formed part of a multi-channel campaign that included an online giveaway for people who posted their photos online with the campaign hashtag.

What is striking about a campaign of this sort is not that people post their photos online or that they are liked and shared, or even that each liked and shared photo has significantly increased visibility on social media. The striking thing is what people talk about: how they feel and what fun they’ve had and the people they were with. In short, MyZeil’s campaign models what retail experts have been



IMAGE: MK ILLUMINATION

Some malls may despair at the higher-than-normal numbers of empty shop windows, others are spotting an opportunity to morph to “shoppertainment” centers.

advising shopping centers for decades: how to attract people by creating an emotive experience worth sharing.

That’s where the beauty of vacant retail spaces comes in: each has the potential to be a “contained experience” that can get people talking about why it’s worthwhile to visit YOUR shopping center. Savvy center managers might create multiple themed “contained experiences” in different



CENTER MANAGEMENT



shop windows to create a temporary, center-wide attraction—think Easter, Halloween, even dinosaurs—or combine “contained experiences” with center events, like exhibitions or indoor markets. The possibilities are boundless. Incorporating digital interaction can help to measure the success of each initiative, too, providing instant information useful in refining future campaigns, measuring footfall and length of stay, and enticing new tenants to the center whilst keeping existing tenants happy.

What the MyZeil example shows is that “shoppertainment” doesn’t need to be complex and extravagant. A successful “shoppertainment” campaign requires planning to ensure that each experience is meaningful and relevant, along with the use of high-quality decorative and lighting elements to bring the experience to life. Online interactions allow people to continue the fun online. The right partner, one who understands experience design as well as products and the retail sector, is a good place to start.

Good planning also means acknowledging that modern attention spans are short. Shop windows need to be changed regularly to keep them fresh, “in season”, and Instagrammable. MyZeil’s success with its Santa experience only lasted until Christmas. It was then replaced with a New Year concept, and now the focus is on Easter. A successful experience campaign is one that changes regularly so that visitors want to return time and again.

The next time you walk around your retail space and see a vacant retail space, stop a moment. Recognize it for what it is: a placeholder for an experience that will drive footfall, and a stepping stone to your transition to a “shoppertainment” center.

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**WE EXPLORE
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ROUTES IN ROCKY TERRITORY**

A BRAVE NEW WORLD – THE SHAPE OF THINGS TO COME

The last 12 months has seen the most catastrophic impact on the F&B sector across the globe. First into lockdown and almost certainly one of the last sectors to re-emerge from the crisis, there’s not a lot more that can be said on the devastation to businesses, employees, and guests that hasn’t already been published. But what of the future? What will the post-pandemic foodservice landscape look like?

BY IAN HANLON



There is, of course, no clear roadmap to the new “normal” and there will still be numerous more low points before we get there. One thing that is certain, however, is that the attitudes, values and beliefs of guests have changed and the purchases bought and the channels they bought through, often out of necessity during lockdown, will become engrained into future lifestyles.

A SHIFT IN GUEST ATTITUDES?

A combination of convenience for the guest and the growth of (near) restaurant quality food delivery of every cuisine imaginable has seen double and even triple digit increases in the delivery sector. In the UK for example, Just Eat saw sales leap by 58% in Q4 of 2020, whilst UberEats posted an even more impressive 150% uplift in the same period.

Now, don’t get me wrong, delivery will never replace the social interaction and “occasion” associated with dining out—you simply can’t recreate the ambience, “buzz” and atmosphere of a busy restaurant at your home – but there’s no denying that the balance of future sales between delivery and dine in will narrow in the future as operators become more omni-channel savvy. With the global foodservice market having an estimated worth of £7.7



IMAGE: COVERPOINT

Ian Hanlon

Director of Coverpoint Foodservice Consulting

trillion and currently only 1% of this as online sales, it is easy to see where growth potential will come from in this sector. Deliveroo in the UK know the way the market is heading announcing earlier this year that 100 new towns and cities will be added to its aggregator network in 2021 –





that's a further 4 million guests it will be able to reach by the end of the year.

One of the first major shopping center landlords to put measures in place to capitalize on the growth of delivery is Uni-bail-Rodamco-Westfield. At its Valley Fair asset in Santa Clara, the team has joined forces with Kitchen United to develop a vertical conveyor belt to take delivery and “to go” orders from the second-floor dining terrace to a ground-floor “ghost kitchen” pick up station, allowing guests to order from multiple outlets in one transaction, and allowing restaurants to generate incremental sales from their bricks and mortar stores. This is one way in which landlords can exploit the delivery boom, utilizing their ability to aggregate orders from multiple vendors in one location.

Whilst the growth of delivery will undoubtedly flourish, future consumer attitudes are changing in other areas too, with a strong focus on wellness, on supporting local businesses by shopping and eating their neighborhoods, and on rewriting the rule book in terms of loyalty to particular brands as the consumer rethinks which product or experience purchases are worthy of their time and money. As much as it will be a new start for the F&B market, it will equally be a new beginning for the guest.

RENT – A SHIFT IN THE BALANCE OF POWER?

It was all going so well—F&B growth had, on average, been consistently at the 3-4% year on year level across Europe and the USA, higher still in Asia, and was showing no signs of slowing down. Of course, there were brands that were on the emergency list prior to the pandemic, with overstretched portfolios, triple A rents and a reluctance to change and adapt, and the crisis quite simply accelerated their demise.

With the numerous CVA's, insolvencies and restructuring of F&B businesses throughout Europe and beyond, the inevitable increase in vacant foodservice space will create a medium-term oversupply of available restaurant space. This will force a correction in what has, in certain prime locations, been becoming an inflated rental market; so, expect to see not only lower rents but also softer lease terms in the short to medium term.

This is already being seen with turnover rent only deals, a combination of lower base rents with turnover top ups and,

in some instances, management contracts replacing leases as landlords and operators work more collaboratively, with landlord returns based on profit share rather than guaranteed rent. In this model, both the landlord and operator share both the pain and reward.

MORE DYNAMIC F&B PORTFOLIOS

It is difficult to imagine a new F&B concept that will grow to 200+ sites in the future in a single country, with the exception of fast food or coffee offers. Good news for consumers in one way as it stops the brand fatigue, they see from visiting numerous high streets or centers, and in another way as it will force landlords and developers to clearly distinguish their gastronomic offer. Expect to see more balanced portfolios in the future made up of dynamic brands with fewer unit numbers, supported with an increase in virtual brands from ghost kitchens.

Chasing top rents for the same “mainstream” brands on long term leases will become a thing of the past. There is a real requirement for landlords, developers and investors, to be more agile, nimble and fast reacting with regards to at least part of the F&B mix. An ability to rotate a selection of operators on a regular basis in order to provide points of difference and keep guests' appetites engaged will be on the menu. Whilst the full service, “mass market” restaurant sector will still provide a base line for an asset, the true winners in the longer term will be those that can incorporate variety into the mix, through street food operators, pop up units, restaurants without tenants and curated mixed-use spaces, such as food halls, that combine entertainment, experiences and local hero F&B offers.

WILL PRE-CRISIS SALES LEVELS EVER BE REACHED AGAIN?

There is no denying that there is enormous pent-up demand for socializing and eating out and this was highlighted by the 100+ million guests who took advantage of the government subsidized Eat Out to Help Out scheme in the UK over the course of the 13 days it ran.

We are social animals—we need to interact, to catch up, to party, to celebrate, to laugh, to gossip—and this almost always certainly involves food and drink, especially after long





periods of self-isolation during lockdowns. After meeting friends and family, the second most popular response for Europeans to go back to once it is safe to do so, is to dine indoors at a restaurant or bar. Whilst some of this demand will go to the newly discovered ‘local hero’ neighborhood offers, consumers will be more demanding of when and where they spend their (reduced in many cases) money.

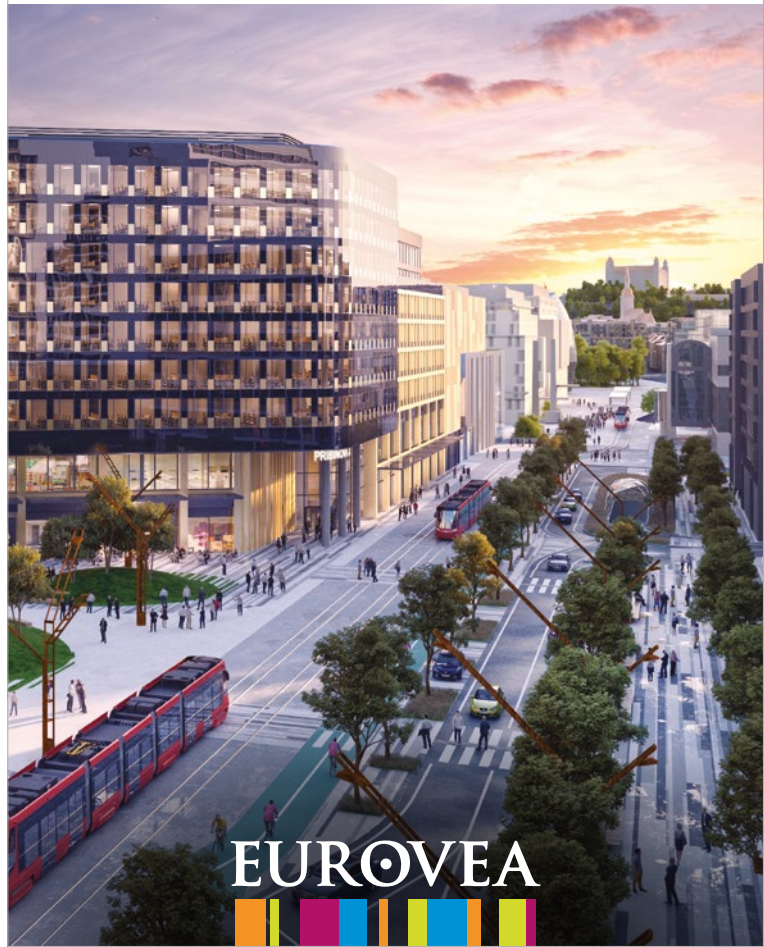
Functional foodservice will not cut it for many consumers in the longer term—landlords will need to create reasons to visit, now more than ever in order to attract and retain footfall. Elements of experiential dining will become more sought after whether it be through unit design, entertainment or ambience—guests need to know that their spend goes beyond simply the meal on their plate, but has been accentuated by those intangible elements that create memories.

The growth of delivery will not dilute the overall F&B market sales “pie”, in fact that “pie” will grow beyond pre-crisis levels as guests are offered more opportunities to spend. Delivery and ‘bricks and mortar’ rather than directly competing with other, more complement each other. The only question that nobody knows the answer to is when sale levels will return—a best guess would be 2025 but, with a prevailing wind and mass vaccination, it may come sooner than we think.

[Click here for web view](#) 



OPENING 2022





CUSHMAN & WAKEFIELD MICHELLE GLODER



IMAGE: CUSHMAN & WAKEFIELD

Cushman & Wakefield has appointed customer experience specialist Michelle Gloder as Head of Customer Experience within its UK Asset Services team.

Gloder has held various strategy, design and implementation roles during her 25 years in the retail, services and telecoms sectors, including leading several projects delivering a step change in customer experience. She joins Cushman & Wakefield from Dixons Carphone where, as Head of Customer Experience, she focused on increasing business value, customer satisfaction and colleague engagement through an improved end-to-end multi-channel journey.

REDSERVE ZAGREB DENIS CUPIC



IMAGE: REDSERVE ZAGREB

Denis Cupic becomes managing director of Redserve Zagreb. The ATP consulting subsidiary redserve is expanding in Central and Eastern Europe. And the Croatian entrepreneur Denis Cupic is playing a leading role.

For around six months, he has been a managing partner with responsibility for key account management in the CEE and SEE Regions; and as a senior consultant he is also responsible for commercial real estate projects.

MACE KEVIN COWIN



IMAGE: MACE

Mace, the international development, consultancy and construction company, has announced that Kevin Cowin has been appointed as Managing Director of its Develop business; and that Kirsten White is joining the Develop business as Financial Director.

The new appointments reflect an investment in Mace's development capabilities as it refreshes its business strategy to focus on town centre regeneration, estate rationalisation and partnerships, whilst adopting ambitious new net zero carbon development targets.

VASTNED REINIER WALTA



IMAGE: VASTNED

Reinier Walta nominated as new CEO. Vastned will optimise its portfolio and concentrate on mixed-use properties in historic city centres where shopping, working, living and leisure meet.

The focus will be on retail properties that attract different types of tenants and where there is potential to create apartments or offices above the shops. Where possible, Vastned aims to create clusters of properties in the various cities. That is the essence of the strategy update presented by Vastned's new nomination for CEO, Reinier Walta.

CAPITAL & REGIONAL LIZ HARDY



IMAGE: CAPITAL & REGIONAL

Capital & Regional and The Mall Walthamstow team are excited to welcome Liz Hardy as the new General Manager at The Mall Walthamstow.

Liz started her new position in January 2021, bringing extensive retail experience developed over a 15-year career in results-driven retail management and commercial strategy. Liz joins The Mall Walthamstow from her previous role as Commercial Manager at LLAOL, the company which operates London Luton Airport on behalf of airport operator, Aena and shareholder AMP Capital.





GROSVENOR BRITAIN & IRELAND **ANDY HAIGH**

IMAGE: GROSVENOR BRITAIN & IRELAND



Grosvenor Britain & Ireland has appointed Andy Haigh as Director of Climate Positive Solutions to lead on the achievement of its 2030 net zero carbon goals.

Previously Andy was Senior Sustainability Manager, Canary Wharf Contractors where he achieved board approval for progressive science-based targets and led on their signing of the BBP Climate Change Commitment. Before this he held a range of sustainability roles at Sir Robert McAlpine, leading the team between 2017 and 2019.

CBRE **COLIN WADDELL**

IMAGE: CBRE



Global real estate advisor, CBRE has announced the appointment of Colin Waddell as Managing Director of its Nordic region effective March 1, 2021.

Colin was previously Managing Director of CBRE's Finland and Norway businesses. In his new role, Colin will oversee CBRE's entire Nordic operations which comprise established businesses in Sweden, Norway, Finland and Denmark.

ATP ARCHITECTS ENGINEERS **CHRISTOPHER HAMMERSCHMIDT**

IMAGE: ATP ARCHITECTS ENGINEERS



In November 2020, the architect Christopher Hammerschmidt joined the top management team of ATP architects engineers, Frankfurt. He is now leading the 70 employees of the ATP Group's design office in Frankfurt am Main alongside the construction engineer and BIM expert Harald Stieber.

Hence, this is another management duo that embodies the interdisciplinary cooperation between architects and engineers that is practiced throughout ATP.

PATRIZIA AG **MATHIEU ELSHOUT**

IMAGE: PATRIZIA AG



Patrizia AG has appointed Mathieu Elshout to the newly created position of Head of Sustainability and Impact Investing, in a strategic hiring move that strengthens the development of new impact fund products and further drives the integration of sustainability into the company's core investment processes.

Mr Elshout will join Patrizia from PGGM Investments on 1 March 2021 where he last held the position of Senior Director Real Estate EMEA responsible for pan-European investments. In addition, he was responsible for delivering high sustainability performance across the private real estate portfolio of PGGM. He will report to Edmund Craston, Head of Fund Management at Patrizia.

CROMWELL PROPERTY GROUP **PERTTI VANHANEN**

IMAGE: CROMWELL PROPERTY GROUP



Real estate investor and manager, Cromwell Property Group announced that Pertti Vanhanen has commenced in the role as Managing Director, Europe.

As a member of the Group Leadership Team, Mr Vanhanen will be responsible for Cromwell's European platform which manages €3.5 billion of real estate encompassing 160 assets and 2,300 tenants. The platform comprises over 210 people in 17 local offices across 11 different countries.





C&A AG HEIN SCHUMACHER

IMAGE: C&A AG



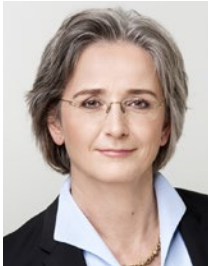
C&A AG appoints Hein Schumacher as board member.

The Board of C&A AG is pleased to announce the appointment of Hein Schumacher as Non-Executive Director, effective 25 January 2021. Hein Schumacher is CEO of the global dairy company FrieslandCampina.

“Hein brings a wealth of international leadership experience to the C&A Board to support the delivery of C&A’s ambitious growth plans. Hein will be a tremendous asset to our Board, bringing another outside-in view to the table, with a strong focus on customer and consumer needs,” said Allan Leighton, Chairman of C&A AG.

KGAL ANKE SAX

IMAGE: KGAL



KGAL strengthens management team with appointment of Dr. Anke Sax as COO/CTO.

KGAL enhances focus on technology application and digital transformation – KGAL GmbH & Co. KG has announced the appointment of Dr. Anke Sax as Chief Operations Officer (COO) and Chief Technology Officer (CTO), with responsibility for the organisation and operations of the KGAL Group and the expansion of its digitalisation strategy.

Dr. Sax joins CEO Gert Waltenbauer, Chief Financial Officer Dr. Thomas Schröer, and Chief Investment Officer Dr. Klaus Wolf as a member of the KGAL management team.

REDEVCO FRANCE CÉCILE POUZADOUX

IMAGE: REDEVCO FRANCE



Cécile Pouzadoux announced as Redevco France’s new Portfolio Director. Cécile Pouzadoux, 43, is set to take the helm of Redevco France’s Portfolio team, after serving more than two years as the company’s Financial Director. She will report directly to Thierry Cahierre, Managing Director of Redevco France and Head of Global Asset Management for the pan-European real estate investment group, Redevco.

A graduate of the ESC Clermont Business School, Pouzadoux went on to achieve France’s higher accountancy degree, the Diplôme d’Expertise Comptable (DEC), followed by 15-years as Senior Manager for audit firm Ernst & Young, where she specialised in the real estate sector.

EPP AGATA SEKUŁA

IMAGE: EPP



JSE-listed EPP announced the appointment of Agata Sekuła as the company’s Executive Management Team Member responsible for sales and acquisitions. Agata will join EPP from 1 March 2021 and be responsible for executing the EPP’s divestment and investment plans, with particular focus on acquiring institutional co-investors for EPP’s retail portfolio.

Agata Sekuła has over 20 years of investment advisory experience in the retail sector and is one of the most renowned retail real estate experts in the Central Eastern European (CEE) region. With a 22-year professional career at JLL, Agata will leave the real estate advisory giant, where she is currently Vice President of the Management Board and Head of the Capital Markets team in Poland.

ULI IRELAND KEVIN NOWLAN

IMAGE: ULI IRELAND



Kevin Nowlan appointed as Chair of ULI Ireland. Kevin Nowlan will prioritise delivering even more valuable content to real estate professionals with a focus on giving back to communities.

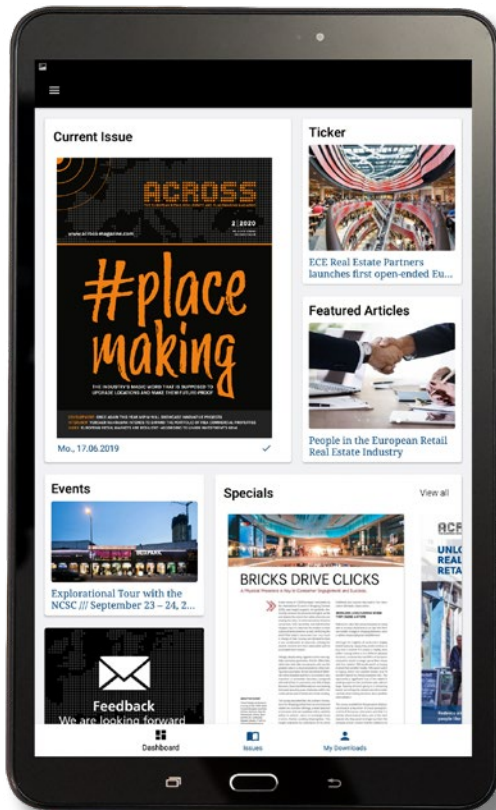
The Urban Land Institute (ULI) has announced the appointment of Kevin Nowlan, CEO of Hibernia REIT plc, as Chair of ULI Ireland. He succeeds Tom Dunne, Chairman of the Residential Tenancies Board, and officially began his two-year term on 1 January 2021.

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GERMANY



CANO

On December 12, 2020, ECE opened Cano, which it developed and constructed, in the southern German town of Singen following a construction period of around two and a half years. The shopping center offers a sales area of approximately 16,000 sq m, which is distributed over three floors, and it features some 85 stores. Of those stores, roughly 55 are concepts that are brand new to the city. As of the opening date, the center is almost fully leased and offers a diverse mix of popular national and international brands as well as concepts from the surrounding region.

ECE has invested around 165 million euros in the development of the mall and will also operate the center in the long term. The center is owned by ECE European Prime Shopping Center Fund II. Cano is located directly in Singen's city center, on the main shopping street, opposite the main train station, and is expected to attract customers from the entire Lake Constance region as well as from neighboring Switzerland. Its catchment area is home to around 370,000 inhabitants in Germany and around 200,000 inhabitants in Switzerland.



IMAGE: ECE

SERBIA



GALERIJA BELGRADE

Galerija Belgrade opened its doors on October 30, 2020 in the presence of Eagle Hills' Chairman Mohamed Alabbar and the President of Serbia Aleksandar Vucic. As part of Belgrade Waterfront, the scheme is an attraction on the local market, both because of its location on the river bank, and because of the size, facilities and product and service range it offers. All international standards of the industry were applied for the design of Galerija Belgrade. With a total area of 300,000 sq m, the biggest green roof in the region, and as many as 3,600 parking spaces,

it offers a new shopping experience which will be further expanded over time. Visitors will find popular international and local brands in one place and enjoy dozens of cafes and restaurants with a beautiful view of the river. In addition to the biggest trampoline park in this part of Europe, there is also Cineplexx Galerija Belgrade—a multiplex cinema with nine halls and more than 1,700 seats, equipped with IMAX technology for movie projection. The architecture is inspired by the spirit and streets of Belgrade with its stone and glass exterior as well as interior floors and facades made of natural materials.



IMAGE: GALERIJA BELGRADE

ROMANIA



AFI BRASOV

AFI Brasov was originally scheduled to open its doors in May 2020. While the outbreak of COVID-19 derailed the initial timetable, things finally came to fruition on October 21, 2020: AFI Europe Romania officially unveiled the mixed-use project in the heart of the city bearing the same name in Transylvania. AFI Brasov consists of a shopping center developed over three floors, covering 45,000 sq m of GLA, and offices covering a total of 15,000 sq m of GLA, which are situated above the shopping center. It offers its visitors over 150 international fashion and beauty brands, as well as popular local brands, playgrounds, a fitness center, entertainment, banks, pharmacies, and a Carrefour hypermarket. Visitors can also enjoy a 3,500-square-meter green terrace, which features a view of Mount Tampa, one of Brasov's landmarks. The investment volume amounts to approximately EUR 148 million.



IMAGE: AFI EUROPE ROMANIA

KOSOVO



PRISHTINA MALL

The fall of 2022 is set to begin with the opening of Prishtina Mall, the largest shopping center in South East Europe (SEE). According to the developers, the importance of this mall is not only local, but also regional in nature. With a location that connects the entire SEE region, a building area of 239,111 sq m, and a leasable area of 114,000 sq m, it is expected to become the premier destination for leisure and entertainment beyond Kosovo. Accredited by Edge for its eco-friendly structure and accessibility for everyone, the interior of Prishtina Mall offers a sensational change of scenery for its customers. It was designed by LaguardaLow Architects, and its architectural value lies in the way the local beauty of the landscape is incorporated into the interior: high ceilings, glass-domed atriums that break through all floors to let in sunlight, green gardens filled with plants, and 7,623 sq m of F&B units for rest, enjoyment, and relaxation. “We are creating something that is sure to be industry-leading and will certainly put Kosovo on the map for shopping and entertainment. It will be the envy of many, and it will bring enjoyment to the numerous people who choose to spend their time with us,” commented Mike Pugh, CEO of Prishtina Mall.



IMAGE: PRISHTINA MALL

SLOVAKIA



NOVUM PRESOV

Last October, Gemo Holding announced the opening of Novum Presov, a shopping and entertainment center in eastern Slovakia that has created 500 jobs. It is located in the heart of the city of the same name, in a place that has long been used for retail and meetings. Novum Presov, therefore, also aims to offer residents from the entire region quality shopping and space for family leisure, and it also significantly complements the urban structure of the city and breathes new life into the city center. The shopping center features the latest Lidl supermarket concept, a modern Cinemax multiplex cinema, equipped with eight movie theaters, the largest children’s playground in Presov, which covers an area of nearly 1,000 sq m, a food court with a 400-seat capacity, which is complemented by two restaurants. In addition, a number of cafes, including outdoor terraces, a McDonald’s restaurant, a Pilsner Urquell pub, a FitUp fitness center, medical offices, and other services will be integrated. Well-known brands, such as H&M, New Yorker, Sinsay, Medicine, Orsay, Douglas, A3 Sport, Humanic, CCC, Martinus, Datart, Intersport, dm drogerie markt, Pepco, Kvety Victor, and many others have opened stores inside the center. Novum Presov is also home to the first Starbucks and Mango stores in Eastern Slovakia. With its 500 underground parking spaces and its proximity to public transport, the center is easily accessible for shoppers.



IMAGE: CUSHMAN & WAKEFIELD

GERMANY



DREHSCHIEBE

Last December, investor and developer Schoofs Immobilien GmbH Frankfurt opened a new shopping center, Drehscheibe, in Homberg, Hesse, right in the heart of the city center. The 17,600 sq m space is home to 22 stores and service providers, ranging from fashion stores and supermarkets to a pharmacy, optician, hairdresser, and nail salon. In addition, the 420-sq m foodcourt offers culinary delights. The hub offers 280 free parking spaces, eleven of which are handicapped accessible and five of which are extra-wide for parents with children. The mall is also conveniently accessible by two bus lines. Free WiFi is available throughout the building. All entrances, stores, elevators, and the toilets on the ground floor are handicapped accessible. The investment volume amounted to 31 million euros. In spring 2021, the property will be transferred to the Irish investor Greenman Ltd. Schoofs will continue to handle the project’s facility management.



IMAGE: RICHARD KASIEWICZ

POLAND



GALERIA ANDRYCHÓW

Last October, construction work officially began on the new Galeria Andrychów retail park – a joint project between Acteeum Group and Equilis Europe. Work in Andrychów in southern Poland began immediately after the investors signed the contract with the general contractor Karmar S.A. Galeria Andrychów is the first retail project in the city and the region to be developed on such a large scale and covers a total GLA of 24,000 sq m. It represents another joint venture between the two investors, after Galeria Chełm, and it is scheduled to open in the fall of 2021. Galeria Andrychów is almost entirely leased, months before its planned opening, with leases signed for more than 90% of the space. Among the featured brands are well-known and popular chains, such as Leroy Merlin, Lidl, CCC, Smyk, Rossmann, Media Expert, Martes Sport, Jysk, KiK, Sinsay, House, Cropp, Deichmann, Divers, Pepco, Dealz, Hebe or Komfort, as well as local stores. The plot of land on which the new retail park is being built is located at the intersection of Krakowska, Biała Droga, and Przemysłowa streets, with direct access to the national road and in the vicinity of the planned Bielsko-Biała – Głogoców bypass. Galeria Andrychów will offer 680 parking spaces.



IMAGE: ACTEUM

AUSTRIA



CENTER ALT-ERLAA

Center Alt-Erlaa, located in Vienna’s 23rd district, has been part of the asset portfolio of the LLB Semper Real Estate fund since 2015. Following extensive refurbishment, the 19,000-square-meter property has been aglow in its new splendor since last November. Thanks to its diversified shop mix and excellent shop partners, Center Alt-Erlaa has proven to be a local full-service provider: In addition to a more than 3,000-square-meter Interspar and a dm drogerie markt, the shopping center is home to a pharmacy, several clothing and beauty stores, as well as a wide range of restaurants and cafés. It also provides some 230 local jobs. In addition, 12 new charging stations for electric cars were installed as part of the refurbishment work. In doing so, the owner has taken an important step toward sustainability. Convenience has also been taken into account: Two new customer elevators, which run from the underground parking garage to the center, ensure a comfortable and weather-protected arrival.



IMAGE: ALLB IMMO KAG

RUSSIA



MESTO VSTRECHI

ADG Group, a Russian development company, has recently announced its annual results for 2020. Despite the challenges posed by the global pandemic, the company has continued to carry out a large-scale project to develop a chain of neighborhood centers. Six centers were opened last year, and another 23 are under construction. ADG Group’s Mesto Vstrechi (“Meeting Place”) project is designed to transform Moscow’s residential suburbs, thereby enabling citizens to meet, dine, entertain, and shop in state-of-the-art public spaces close to their homes via the revival of the heritage of old Soviet cinemas. In December 2014, ADG Group acquired more than 30 old Soviet cinemas from the city of Moscow. The deal envisioned the conversion of the old buildings into recreation centers, but preserving their original functions – showing movies. Based on its understanding of retail and public space trends, the company developed a format called a “neighborhood center,” a hybrid space with a modern multiplex cinema, public lounge areas designed for lectures and master classes for all ages, a food hall offering numerous gastronomic concepts, spacious entertainment areas for children, and nearby shopping. The size and tenant mix of each center is tailored to the people who live within walking distance of each center and was determined based on the results of an opinion survey conducted with local residents.



IMAGE: ADG GROUP

GERMANY



PLÄRRERMARKT

The Plärrer is one of the major traffic junctions in Nuremberg. The location lacked a neighborhood center, complete with shopping facilities for daily needs, for one and a half years. That all changed on October 28, 2020 when the Plärrermarkt shopping center opened, offering a wide range of shopping options. Anchor tenant Edeka operates an E-center with a full-range that provides local supplies for local residents as well as commuters. Other retailers, such as dm drogerie markt, NKD, TEDi, kik, Takko Fashion, Selma Öz Butik, Mit uns Reisen, green Orient, and New York Nails complement the offer. The shopping center is rounded off by a large food court that features a variety of restaurants and fast food outlets. CEV Handelsimmobilien GmbH, a wholly owned subsidiary of Edeka, is behind the redevelopment of the location. In cooperation with Kehrbach Planwerk, a planning company, CEV extensively refurbished and remodeled the lower three floors of the building. The final result is a light-flooded atrium and shop areas fitted with state-of-the-art equipment, which are accessible via a wide escalator. A spacious elevator and level access routes ensure that the center is barrier-free. Plärrermarkt features its own access to the subway, which is extremely advantageous, particularly for commuters. Medical practices and offices are located on the upper floors.



IMAGE: CEV



CHINA



SANYA CDF MALL II

The recently completed Sanya CDF Mall II was named “Best Retail Development” at the 2020 Mipim Asia Awards. The winners were selected from over 110 entries from 10 APAC countries by a jury of senior-level real estate leaders. Teri Tsang, Design Director at Benoy, who is responsible for architecture, says: “We are honored to receive this award. Our vision was to create a world-class destination that integrates experiential retail, entertainment, and leisure within a comprehensive development that delivers economic, social, and environmental benefits to our client and the wider community. Sanya CDF Mall II is located in Hainan Province, which is well on its way to becoming China’s largest special economic zone, focusing on trade and investment liberalization. The project features a wide variety of lush greenery and blue waterways, celebrating the surrounding landscape and multi-layered environment. Sanya CDF Mall II, which is visually inspiring and distinctive in its design, has set a benchmark for design in the region.



IMAGE: BENOY

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INDONESIA



THE PARK SEMARANG

The Park Semarang is a 90,000-square-meter mixed-used development comprised of the largest retail mall in Semarang and a 4-star hotel, which is currently under construction and scheduled to open soon. With a leasable retail area of nearly 50,000 sq m, it will be anchored by international fast fashion tenants, including H&M, a 3-level department store, a supermarket, a cinema, as well as games, and it will be complemented by an array of specialty tenants, thereby providing a comprehensive retail offer, dining, and lifestyle experience for Semarang. The project, which provides more than 1,200 parking spaces for cars and is only a 10-minute drive from the city center, is designed for customer convenience. The Park Semarang is a joint venture between NWP Retail, which owns and operates 14 retail developments across Indonesia, and PT. Putra Wahid Land, a local developer.



IMAGE: NWP RETAIL

The project, which provides more than 1,200 parking spaces for cars and is only a 10-minute drive from the city center, is designed for customer convenience. The Park Semarang is a joint venture between NWP Retail, which owns and operates 14 retail developments across Indonesia, and PT. Putra Wahid Land, a local developer.

HONG KONG



11 SKIES

11 Skies, a mixed-use destination located at Skycity, will be Hong Kong’s largest hub for retail, dining, and entertainment (RDE) and will be the first such development to combine wealth management and wellness services. Lead8 has recently announced that the firm’s appointment as lead consultant has been expanded to include interior design in addition to its masterplanning and architecture scope. “This is a ground-breaking development that continues to attract international interest. It is a testament to the commitment, creativity, and expertise of our team that we have been entrusted to design and deliver the city’s most comprehensive and enhanced RDE destination to date,” said Claude Touikan, Co-Founder & Executive Director at Lead8. Operated by K11, 11 Skies will feature 241,000 sq m space dedicated to dining and retail outlets and 53,000 sq m for experiential entertainment facilities. More than 800 shops will be available, including over 120 dining concepts paired with entertainment never seen before in the region – all under one roof. Phase openings are scheduled to take place from 2022 to 2025.



IMAGE: LEAD 8

ACROSS ADVISORY BOARD

The body's declared aim is to offer its expertise in topic formulation. It identifies the challenges the industry faces as well as the opportunities, emerging trends, etc. it sees. ACROSS's Advisory Board currently has 22 members. These are (in alphabetical order):



IMAGE: ATP

CHRISTOPH ACHAMMER
Chairman of the Board at
ATP architects engineers



IMAGE: CONIQ

BEN CHESSER
Founder and CEO of Coniq



IMAGE: MULTI CORPORATION

PATRICK VAN DOOYEWEERT
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IMAGE: ECE

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IMAGE: MCARTHURGLEN

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Senior Retail Expert



IMAGE: MK ILLUMINATION

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IMAGE: ROS

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Shopping



IMAGE: IMMOFINANZ GROUP

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JAN TANNER
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IMAGE: PLACEWISE

PETER TONSTAD
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IMAGE: UNION INVESTMENT

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Head of Investment
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IMAGE: EVA TRIFT

MARCUS WILD
Member of the Executive
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Atrium Group is one of the leading owners, managers and re-developers of food- and fashion anchored shopping centers in urban CEE locations. Currently, the Group's portfolio includes 46 shopping centers and retail properties in six countries, with a market value of €2.6 billion and a total gross leasable area of approx. 1.1 million sqm. In 2017, Atrium company recorded a gross rental income of €198.7 million. The company is listed on the Vienna Stock Exchange and Euronext Amsterdam, where it is marked as ATRS.

Atrium owns and manages 21 shopping centres with a total gross leasable area (GLA) of 517.400 sq m in Poland, its leading market. Nine key Atrium assets located in Poland: Atrium Promenada, Atrium Targówek and Atrium Reduta in Warsaw, Galeria Dominikanska in Wrocław, Focus in Bydgoszcz, Atrium Copernicus in Toruń, Atrium Felicity in Lublin and Atrium Biała in Białystok, and Atrium Koszalin in Koszalin.



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Christmasworld – Seasonal Decoration at its best – is the leading international trade fair for festive decorations. Exhibitors from all over the world present the latest trends and products for all festive occasions of the year – including innovative concepts for decorating large spaces and outdoor areas, such as shopping centres – in Frankfurt am Main.



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Cineplexx Cinema Group was founded in 1993 as a 100% subsidiary of Constantin Film-Holding GmbH which is an Austrian entrepreneurial managed company. Cineplexx emerged in the transition phase during the 1990s when traditional cinemas were closed and multiplex cinemas entered the market. Since 2008 the group has bundled its international business activities under Cineplexx International GmbH. In total it runs 60 cinemas with more than 400 screens across Austria, Slovenia, Croatia, Serbia, Montenegro, North Macedonia, Albania, Greece, Republic of Kosovo, Bosnia and Herzegovina, Romania and Northern Italy. Total sales reached 150 Mio. Euro in 2019 with about 1600 employees.



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Designer Outlets Wolfsburg, one of the five largest outlet centers in Germany, provides an exceptional shopping experience with more than 90 brand-direct stores, including notable brands like A&F, Calvin Klein, Coach, Michael Kors, Nike, Polo Ralph Lauren, Tommy Hilfiger and several restaurant options.



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dfv Conference Group, the event arm of dfv Media Group, develops, organizes and produces executive-level conferences and conventions across a wide range of sectors and themes. As a relationship manager, it turns media and information into a hands-on experience fostering professional exchange and networking throughout the business community. The majority of the delegates attending its events come from senior management and other top-ranking corporate positions.



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ECE was founded in 1965 and is still owned by the Otto family. The company provides all services related to properties from one source. The assets under management currently amount to 32.3 billion euros. With 195 shopping centers under management and activities in 12 countries, ECE is the European market leader in the shopping center industry. Approximately 20,000 retail businesses generate an annual turnover of 22.3 billion euros on an overall sales area of 7 million square meters.



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EUROVEA mixed-use-development and is a part of the modern urban quarter in the vicinity of the historical center of Bratislava and represents an entirely unique and dynamic destination with riverside promenade. Eurovea broader patterns of living, working and shopping as it provides the sort of downtown, high street shopping experience which the city doesn't offer now.



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On top of Fiba Group's 30 years of experience in both financial and non-financial sectors, FIBA Commercial Properties has an experience in real estate and thus is a power in the industry as a leading global investor managing commercial properties all around the world. Managing 600.000 sq m leasable area and over 1000 global brands and stores, FIBA Commercial Properties is successfully operating, constructing and developing a total of 10 shopping malls, 5 office buildings, 4 residences 1 Hotel and 2 cinema complexes in Turkey, China, Romania and Moldavia with reputable partners. With these experiences, FIBA Commercial Property Management has been launched with the aim of adding value to the investments of other stakeholders, in the last quarter of 2018.



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The German Council of Shopping Places, GCSP, represents the interests of over 770 member companies in the shopping center and commercial real estate industry, including operators and developers, trade representatives, service providers, consultants, investors, and other companies.



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GfK GeoMarketing is one of Europe's largest providers of geomarketing services and products. Our business areas include: Consultancy and research expertise, Market data, Digital maps, RegioGraph. GfK GeoMarketing is a subsidiary of GfK, one of the world's largest and most renowned market research companies. Drawing on this international network of wide-ranging resources and expertise, GfK GeoMarketing promotes business success and "growth from knowledge".



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HB Reavis is an international workspace provider with strong experience in retail projects. Over the years HB Reavis created a network of shopping centers in Slovakia and the Czech Republic that are top-ranking in their respective regions. In the minds of customers the Aupark brand is inseparably linked with quality shopping and active leisure. In 2020, HB Reavis will deliver the Nivy Station project in Bratislava. A mixed-use scheme combining a shopping center, an international bus station, and a modern urban marketplace where customers can buy fresh groceries and the finest domestic products, all topped by an accessible green roof. This project will become yet another vital addition to Nivy zone, an up and coming new district in the Slovak capital with a vibrant business ecosystem.



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As the market leader for networking in the form of events and business matching, Heuer Dialog has been accompanying the real estate industry in accessing all disciplines that deal with questions about the future of urban and real estate worlds since the 1980s. With around 50 events per year we enable high-level executives to meet on our platforms physically, virtually or even both at the same time in a hybrid setting for sustainable urban, real estate and building development. We build networks with power, creativity and capital that secure the future of cities, regions and companies.

As initiator and moderator, Heuer Dialog brings together minds from architecture, civil engineering, ecology, economics, sociology, technology and law in face-to-face dialogues. Over the past four decades, more than 100,000 personalities have taken part in lectures and discussions that have led to impulses for current and future action.

In association with the Immobilien Zeitung and the dfv Mediengruppe with more than 100 specialist titles, Heuer Dialog sees itself as the competence centre for events related to real estate.



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HMSHost International is part of the Autogrill Group—the world's leading provider of food & beverage and retail services for people on the move. We operate in Europe, Asia-Pacific, and the Middle East and have 50 years' experience in airport restaurant operations, design, concept and development. We transform travelers into customers by enticing them to use our services and ensuring that when they think back on the experience, it brings a smile to their face. HMSHost International creates places where people want to be. We do this by original and unique food & beverage concepts, sophisticated marketing initiatives, clever technical innovations and engaged staff.



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iMallinvest Europe is an independent and dedicated retail asset management and investment advisory firm. The company advises institutional real estate investors and developers of modern shopping destinations in their acquisitions, complex asset restructuring projects and disposal programs. iMallinvest contributes independent expert views to investors' asset specific, strategic business planning. Its management is specialised in advising alongside variant forms of international real estate investment partnerships.



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IMMOFINANZ is a commercial real estate group whose activities are focused on the retail and office segments of seven core markets in Europe: Austria, Germany, Poland, Czech Republic, Slovakia, Hungary and Romania. The core business covers the management and development of properties, whereby the STOP SHOP (retail), VIVO! (retail) and myhive (office) brands represent strong focal points that stand for quality and service. The real estate portfolio has a value of approx. EUR 5.0 billion and covers more than 210 properties. IMMOFINANZ is listed on the stock exchanges in Vienna (leading ATX index) and Warsaw. Further information under: <http://www.immofinanz.com>



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With over 40 years of experience, Ingka Centres today owns 45 centres on 15 markets that span from Europe to China and Russia, welcoming 480 million visitors each year. Our centres are always anchored by an IKEA store and we are now on a journey to develop a new kind of meeting places that involve IKEA retail, local communities, our tenants and the many people.



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As a privately owned real estate investment and management company, Kintyre provides a German management platform for institutional and private investors that are seeking a partner as a co-investor and a highly committed asset and property management service provider. The group has offices in Frankfurt, Berlin and London, from which it maintains close contacts with clients seeking access to the German market. For additional information on Kintyre Investments please visit www.kintyre.de



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Mallcomm is a 360 technology platform for asset and property management that streamlines everyday tasks, joins up stakeholders and generates new insight for more efficient and effective operations. The platform seamlessly connects all built environment communities: occupiers, operations, suppliers, consumers and other stakeholders. By transforming the users' experience of the space, Mallcomm creates loyalty by connecting people to places while delivering efficient operations, significant budget savings and valuable insights. By using the most established, advanced and cutting edge technology, Mallcomm helps managers curate and promote their ecosystem and provides a suite of powerful data insight to efficiently measure and adapt the outputs of B2B and B2C engagement.



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MAPIC is the key meeting point for retailers looking for partners, and property developers and owners looking for retailers to enhance their sites. MAPIC delivers 3 days of tailored meetings, expert-led conferences and a premium exhibition for industry leaders targeting all types of retail property: shopping centers, cities, factory outlets, leisure areas and transit zones.



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MAPIC RUSSIA
 The largest retail real estate expo
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MAPIC Russia is the largest retail real estate event on the Russian market. The exhibition annually brings together leading professionals in the retail real estate industry. MAPIC Russia provides opportunities for the most effective interaction with a professional target audience: retailers, developers, equipment and technology suppliers, management companies, consultants, and investors.



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MEC METRO-ECE Centermanagement GmbH & Co. KG is a joint venture of METRO and ECE. As the German national market leader for retail parks, MEC has more than 215 employees and manages over 75 retail properties. Its service portfolio includes customized services for all aspects of integrated center management, including commercial and technical management, leasing, marketing, development, commercial asset management and property management for smaller retail properties. The market value managed (assets under management) was around €3.5 billion in 2019. In all locations, approximately 1,100 rental partners generate an annual turnover of more than €3 billion over a rental space of 1.6 million m².



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Messe Frankfurt is one of the world's leading trade fair organisers. 592,127 square metres of exhibition ground are currently home to ten exhibition halls and two congress centres. Events "made by Messe Frankfurt" take place at approx. 50 locations around the globe and cover the fields of consumer goods, textiles & textile technologies, technology & production, mobility & logistics and entertainment, media & creative industries.



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MK Illumination is the leading provider of year-round festive lighting solutions that form the cornerstone of powerful marketing, engagement, and visitor attraction campaigns. The family-owned business was founded in 1996 and has a local presence in more than 40 countries. Each year, its independently-owned subsidiaries combine global experience with local knowledge to deliver upwards of 1200 projects worldwide for clients in a range of sectors including Retail Real Estate, Public Spaces, Travel Retail and Leisure. MK Illumination is known for its innovative full-service approach, its commitment to the highest quality products and services, and for creating extraordinary, tailored solutions that deliver results.



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Multi Corporation is a leading pan-European integrated service platform for retail real estate assets, managing about 100 retail assets for institutional investors across Europe and Turkey. We offer a full spectrum of services, including active asset management, shopping centre operations, redevelopment and refurbishment, leasing, legal and compliance. Our broad financial, commercial and technical expertise has enabled us to outperform the industry in terms of occupancy, net rental income and state-of-the-art shopping centre marketing over the past few years. Multi's in-house studio for master-planning and architecture, TDesign, uses their fundamental knowledge of shopping centre functionality to enhance the retail environments in our portfolio. In total, they welcome over 400 million customers annually, spending an estimated € 4 billion in over 6,000 stores, restaurants and leisure attractions. Multi's office network boasts a team of 650+ talented professionals in 14 countries: Belgium, Germany, Hungary, Ireland, Italy, Latvia, the Netherlands, Poland, Portugal, Slovakia, Spain, Ukraine, the United Kingdom and Turkey.



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Founded in 1969, NEINVER is a leading international property company specialized in managing the entire property cycle of its projects. With operations in France, Germany, Italy, Poland, Portugal, Spain, the Netherlands and the Czech Republic, NEINVER has bolstered its position in the European retail property sector, managing 25 centres, 613,000 sqm of GLA, 2,000 store locations and 1,000 of the finest brands. For more than 20 years, NEINVER's growth strategy has been based on specialisation in the outlet sector, through its brands The Style Outlets and FACTORY. It currently manages 18 centres with a total GLA of 368,700 sqm, and is the only outlet operator with an omnichannel strategy.



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Placewise is the global leader in shopping center property tech, serving more than 1,050 shopping centres, across 4 continents and 20 countries. Placewise has offices in Europe, the USA, and Asia and is backed by both venture and PE funds. We offer the only solution purpose-built for shopping centres to create long lasting digital relationships with shoppers - unlocking the power to monetize retail properties beyond the square meter.



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REBEC, acronym of Real Estate Belgrade Exhibition & Conference, is the indispensable specialized event dedicated to the subjects coming from developments of real estate ventures in the SEE region, premiered in 2008. From the last three Volumes, it has specialized separately and additionally for topics related to the development of the all nature of projects in retail industry. In addition to the conference program, it also includes a fair section, thus attracting all key players of the SEE region who come from the sphere of development & financing, design & construction, contracting & rental, property and asset management segments in the retail industry world.



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Redevco is an independent, pan-European real estate investment management company specialised in retail property. The 400 assets under management are spread across the strongest retail concentrations throughout Europe. Our highly-experienced professionals purchase, develop, let and manage properties, ensuring that the portfolios optimally reflect the needs of our clients. We believe in long term investments where quality and sustainability are key.



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Founded in 2004, the redos Group is one of the leading independent retail property specialists in Germany. The company provides comprehensive portfolio and real estate management services for institutional and semi-institutional investors through its business lines investment, asset management, fund management, redevelopment and advisory. As an investor and active asset manager, redos covers all risk classes, offers all types of investment vehicles and also designs its own funds for large-scale retail properties. The retail specialist currently manages 95 assets across Germany, which are worth 2,91 billion euros.



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ROS Retail Outlet Shopping, headquartered in Vienna, with partnerships in Poland, Italy and France, is an independent retail real estate consulting and centre management company specialised in Designer Outlets and innovative shopping concepts across Europe. The founders Thomas Reichenauer and Gerhard Graf are both committed professionals with many years of experience and knowledge in the European outlet market as well as recognized personalities in the industry. The portfolio of ROS Retail Outlet Shopping includes Designer Outlet Soltau, City Outlet Geislingen, Brugnato 5Terre Outlet Village, Designer Outlet Warszawa, Designer Outlet Gdansk, Designer Outlet Sosnowiec, Premier Outlet Budapest, Designer Outlet Algarve, Designer Outlet Croatia, Barilla Center Parma and further new developments in Europe.



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SES – No. 1 in Austria and Slovenia for large-scale shopping centers – is specialized in developing, constructing and managing first-class retail real estate at an international level. The company provides complete service from development to center management in Central, Southern and Eastern Europe. Shopping malls managed by SES are among the very best the industry has to offer.



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The Supernova Group is a private, internationally active company based in Graz, Austria, whose main activities are the purchase, development and long-term management of commercial real estate in CEE and SEE countries. The current portfolio of the group includes assets in Austria, Slovenia, Croatia, Slovakia and Romania. Currently, the Group's portfolio includes more than 80 retail assets (Shopping centres, Shopping parks, Retail parks, DIYs and High street properties) in 5 countries, with a market value of €1.2 billion and a total gross leasable area of approx. 1 mio sq m.



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The Happetite (previously known as MAPIC FOOD) is the international event dedicated to multi-site restaurant operators looking to grow their business. This powerful business platform is the unique chance to find new international food retail concepts and meet restaurant industry decision makers! In 2020, the event will increase its international reach by welcoming a larger and broader range of international restaurant and dining operators. Key international restaurant chains & operators will exhibit to meet private equity firms and property players to grow their business. Some of them will showcase their concepts in the Tasting area! Held in Milan (Italy), this 2-day event brings together all the restaurant chains, restaurant operators, travel operators, franchise partners and restaurant industry suppliers to develop and create the food destinations of tomorrow.



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21Media has been a leading Marketing and Advertising agency for Shopping Centres for over 25 years. Its client list features some of the biggest names in European retail including Meadowhall, Glatt, ALEXA, CentrO, and Fünf Höfe. Full-service B2B and B2C support is provided at every stage of a mall's life cycle: from strategic positioning through to hands-on day-to-day Centre marketing. The company's reputation as B2B specialists is built on helping owners and operators market their properties with improved leasing tools, engineering a stronger tenant mix and growing a Centre's asset value. 21Media's achievements have been recognised by 15 ICSC European Marketing Awards including the Global ICSC "Best of The Best" Viva accolade.



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umdach provides special retail solutions: rooted in craftsmanship, visionary in the digital, always with a human aim and a goal: to realise successful stores. The Store Makers from umdach create extraordinary worlds of experience for demanding customers across Lifestyle Retail, Food Retail and Premium Retail. Digital Retail solutions included. General Contracting—the all-round, care-free package from umdach—has developed strongly in recent years. With a top network of professional experts and prudent management skills, the Store Makers ensure all the trades, such as lighting, floors, fire protection and much more, work to schedule—We take care of everything.



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Unibail-Rodamco-Westfield is the premier global developer and operator of flagship shopping destinations, with a portfolio valued at €65.0 Bn as at June 30, 2019, of which 86% in retail, 7% in offices, 5% in convention & exhibition venues and 2% in services. Currently, the Group owns and operates 92 shopping centres, including 55 flagships in the most dynamic cities in Europe and the United States. Its centres welcome 1.2 billion visits per year. Present on 2 continents and in 12 countries, Unibail-Rodamco-Westfield provides a unique platform for retailers and brand events, and offers an exceptional and constantly renewed experience for customers. With the support of its 3,700 professionals and an unparalleled track-record and know-how, Unibail-Rodamco-Westfield is ideally positioned to generate superior value and develop world-class projects. The Group has a development pipeline of €10.3 Bn. Unibail-Rodamco-Westfield distinguishes itself by its Better Places 2030 agenda, that sets its ambition to create better places that respect the highest environmental standards and contribute to better cities. Unibail-Rodamco-Westfield stapled shares are listed on Euronext Amsterdam and Euronext Paris (Euronext ticker: URW), with a secondary listing in Australia through Chess Depository Interests. The Group benefits from an A rating from Standard & Poor's and from an A2 rating from Moody's.



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Union Investment is a leading international investment company specializing in open ended real estate funds for private and institutional investors. Union Investment has assets under management of some €28.5 billion in ten real estate funds. Active in the property investment business for more than 50 years, Union Investment operates today in 24 countries around the world. In addition to office space and business parks, the Hamburg-based company is investing in business hotels, logistics properties and shopping centers. Union Investment entered the retail sector at an early stage, allowing the company to secure a strategic position in this growing area. The result is a high-quality portfolio presently comprising 46 shopping centers in Germany, Austria, Sweden, Belgium, France, Poland, Czech Republic, Italy, Spain and Turkey, with a current market value of some €7.4 billion.



VIA OUTLETS
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The newest and fastest growing owner operator of outlet shopping destinations in Europe. VIA Outlets, a private equity fund, has been established in 2014 to acquire existing outlet centres across Europe, and, using the expertise of its operating partners, enhance their performance so as to provide strong investment returns for its shareholders. These returns will be achieved through creating shopping environments which will attract high quality domestic and international brands and their discerning customers. VIA Outlets has been structured to enable it react quickly to acquisition opportunities that may arise in the market. The pan-European portfolio of VIA Outlets comprises 11 centres in 9 European countries with a total GLA of about 259,000 sqm and over 850 stores under management.



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Westgate Shopping City is the largest shopping mall in Croatia and second largest mall in European Union with over 250.000 sqm of space. It is heart of Westgate Zone with additional 500.000 sqm fully infrastructurally equipped land plots around the mall available for various projects of retail, entertainment and tourism. Westgate is located centrally in north Croatian region on outskirts of Zagreb and in under 90 minutes of drive a dense region of Slovenia and Austria with a large catchment area of around 3.500.000 inhabitants. Closest catchment area of Westgate is north Croatia and Zagreb as capital and makes for 560.000 inhabitants in under 15 minutes to center and 1.3 mil. inhabitants in under 30 minutes of drive. Center has public transport access by bus and train. Regulation in Croatia allows working Sundays and flexible opening hours. As a family mall of Croatia, Westgate has the largest indoor kid's playground in Croatia spaced on over 4.000 sqm and gives various entertainment and gastronomical offer as well as unique museum of old timer vehicles what makes it an destination.



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Technology provider Yardi is committed to the design, development and support of investment, asset, and property management solutions to help companies drive success in today's real estate market. Yardi presents a complete set of connected real estate solutions designed to help you manage every role and every aspect of your real estate business from any internet browser and any device. Serving clients in over 80 countries across the world, and supporting 12 million residential units, 12 billion commercial square feet, and more than 1 trillion euro in assets under management, Yardi has experience you can trust to power your business.



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