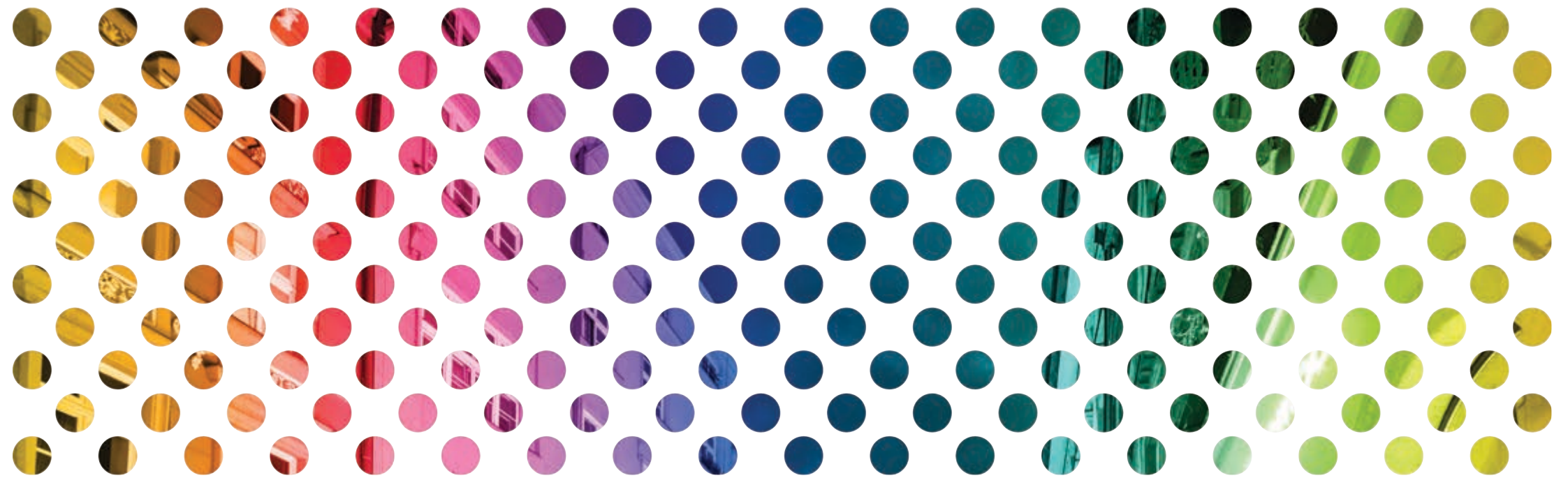


WARSAW KRAKOW HIGH STREET REPORT





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Introduction

It has been noted that Polish customers are now more inclined to shop in high streets than they were a few years ago. The shopping patterns related to spending free time have been changing and nowadays, many city streets with cafes, restaurants, new pubs and clubs attract not only tourists but also significantly more inhabitants. They are seeking new social experiences and fresh brands that are not available in the shopping centre offer.

Moreover, the Warsaw high street retail sector is clearly benefiting from the lack of retail space in shopping centres. The development potential of the high street retail market has been noticed by developers that are seeking new locations for their projects. Many tenants choose only high street locations to open their first store in the country.

However, the process of creating and effectively managing the dynamically changing urban environment within the high street is long and complicated. In Warsaw, in particular, there are a number of obstacles and issues that have a significant impact on further development. The most crucial are:

Clear strategy relating to the management and development

Lack of clear strategy relating to the management and development of each street, reflecting its individual character. This is linked to the lack of an overall valid zoning plan for the capital's city centre, but also to not having a special management team, responsible for proper planning and tenant re-engineering. In many western cities there are special public – private partnerships established to coordinate city planning and infrastructure utilising public finances combined with entrepreneurial experience, knowledge and private capital. Such a solution could prove very successful in many Polish cities, which despite a number of very active different associations, still lack proper co-ordinated establishments.



Ownership structure

The diversified ownership structure of the centrally located retail units and tenement houses adds to the difficulty of planning any investment. The potential claims often deter investors from buying schemes. Conversely, as the city owns a number of buildings, it is much easier to manage them with a clear strategy, driven not only by the profit generated but also by public needs.

High levels of land and building prices

High levels of land and building prices, keep away potential investors that are not able to achieve profits within the current market circumstances. Therefore many well located buildings are not used properly or are closed and cannot find buyers, spoiling the image of the streets. The only way to force the owners to sell their assets is to have a proper property taxation policy imposed by the city.

Traffic and parking

Properly organized traffic and parking. The organization of high streets should be strictly controlled and adjusted to suit pedestrian requirements. Easy pedestrian flow and access for customers is the key to success for all retailers. Sidewalks should be wide enough for dining areas outside restaurants and cafes. Parked cars, traffic lights, long passages and other barriers hinder customer access to the shops and restaurants. However, although pedestrianisation in city centres is desirable, a lack of convenient, well accessible and secure parking is often a weakness in many cities and this could also be improved.

Each city is different. While Warsaw faces all of the above issues, the retail streets in Krakow take a large share of retail market and have much less to improve on. Both cities however are under constant evolution and will be actively developing in the future.

WARSAW

HIGH STREET

DIRECT COMPETITION

The city centre, being a natural location for high street retailers, has also encouraged developers to build shopping centres in central areas. In 2007 ING RED fund brought the **Złote Tarasy** shopping centre to Warsaw's city centre retail market, which created serious competition for the shopping streets. This, however, is the only regular shopping centre located in the heart of Warsaw and has developed a synergy with the other retail formats since its opening.

Apart from Złote Tarasy, Warsaw witnessed completion of another retail scheme by the end of 2011 – **VitkAc department store**. This unique concept gathers luxury international fashion brands under one roof, including Saint Laurent, Chloe, Gucci, Lanvin and the recently opened Louis Vuitton.

Much older than VitkAc, but still attracting numerous tenants and the fashion-oriented are the **Wars, Sawa and Junior** department stores, located on Marszałkowska Street. This hybrid scheme with nearly 30,000 sq m of GLA includes such tenants as H&M, Reserved, Empik, Marks&Spencer, Zara, Sephora, iSpot and Carrefour.

FUTURE TRENDS

Along with the development of the retail market, Warsaw's shopping streets are forecasted to continue their evolution. It is expected that new retail streets will be formed, with Świętokrzyska being one of them. As the second metro line is scheduled to be completed by the end of 2014, Świętokrzyska Street is also about to undergo a major refurbishment, as a consequence of which it may retrieve its pedestrian character and attract both new tenants and new shoppers.

Another location that may soon evolve into a shopping area is the far end of Marszałkowska Street, stretching from Zbawiciela Square to Unii Lubelskiej Square, an area which does not yet resemble a high street. However, the new mixed-use investment – Galeria Miejska Plac Unii with many prestigious tenants recently became a new destination itself, and therefore Marszałkowska Street, with plenty of retail units is forecasted to gain in importance.

There is also a visible trend of refurbishing old department stores and tenement houses to host retail tenants together with offices on the upper floors. The first of such projects is Mysia 3 – this concept store is a location for many top-tier Polish brands such as Dawid Woliński, but also for H&M's exclusive project – COS. Located close to VitkAc and Trzech Krzyży Square, Mysia 3 strengthens the importance of the area.

Chmielna 25 is another project that offers retail on the ground floor in a newly developed scheme, the area has been fully leased by Smyk for a flagship store. The project has been recently transacted which proves that there would potentially be a demand for high street developments.

Other projects that are still in the planning phase, however moving towards reality include the redevelopment of two department stores that historically were the first of a kind in Warsaw – Sezam and Smyk. Smyk, formerly known as CEDET will offer retail units on -1, 0 and 1 floors and can already be called successful due to its established location as a retail destination. Sezam on the other hand, currently referred to as Centrum Marszałkowska, is planned to be demolished and rebuilt as a mixed-use scheme with a comparably well settled location for retail tenants. There are also other projects in the pipeline, subject to the availability of financing, that would offer high street retail units, one of them being Qualia's mixed-use project offering multiple retail floors. This investment, located on Sienkiewicza Street would naturally prolong the retail area on Pasaż Wiecha, moving it towards Świętokrzyska Street.

RENTS

Warsaw is the most expensive retail location in Poland with prime rents at about EUR 75-90/ sq m/ month (for the best units of approximately 100 sq m in a prime shopping centre) and average rents at EUR 30-45/ sq m/ month. High street rents for prime units reach EUR 70-90/ sq m/ month. The lack of available retail space increases the upward pressure on rents in the best locations, however average rents remain stable with the downward pressure, especially when high streets are concerned.

RETAILERS

There are three groups of retailers that are continuously shaping the high street retail market in Poland. The first is composed of international fashion and beauty brands, such as H&M, Orsay or Sephora, that choose high street locations as a complementary offer to shopping centre locations, simultaneously and equally developed as part of their strategy.

Restaurants and cafes create another strongly developing high street offer, with a variety of fancy eateries of different origins, chain and private cafeterias and high quality restaurants. There are already a few streets or sectors that have naturally distinguished particular gastronomy hubs.

The last group of tenants worth mentioning in the consideration of shopping streets in Poland are services and grocery shops, necessary as a part of the daily shopping routine.

Every year CBRE notes around 30 new retailers entering the Polish market, the majority of which are choosing Warsaw as their point of entry. Depending on the brand's strategy, there are those which locate their stores in shopping centres whilst others choose only high street locations.

Over the last few years Warsaw's high streets have become enriched by such brands as Salvatore Ferragamo, COS, Hebe, Green Caffe Nero, Tiger and Louis Vuitton.

Warsaw's high streets are favoured amongst Polish fashion designers who choose Mokotowka Street and other streets surrounding Trzech Krzyży Square as locations for their ateliers. This group of tenants is exemplified by Robert Kupisz, Ania Kuczyńska, Maciej Zień and Dawid Woliński.



CHMIELNA

Chmielna Street has always been perceived as one of Warsaw's top shopping streets, particularly as it is the only one without the regular car traffic. This promenade is a natural entry point for restaurants and cafes (35% of all retailers), but also attracts fashion and shoes stores (nearly 30% of all retailers) and jewellery. Located in the heart of Warsaw, along Jeruzolimskie Avenue and between Marszałkowska and Nowy Świat Streets, Chmielna is well exposed to pedestrians,

yet hidden and somehow intimate. However, despite being recognizable and acknowledged, Chmielna has been slowly losing its retail character over the last few years. Vacant units are more frequent here than on other shopping streets. Nonetheless, new investments such as LHI's Chmielna 25 and other announced are bringing a fresh wave and will help to restore the image of Chmielna. There are a few stores and restaurants that attract



- 1. Bordo
- 2. Cukiernia i Piekarnia Julia
- 3. Cupriak
- 4. Green Caffè Nero
- 5. Verona
- 6. Kantor
- 7. Calzedonia
- 8. C.K.Oberża
- 9. Bubbleology
- 10. Zielony Kot
- 11. Frytki Belgijskie
- 12. Kantor
- 13. Optyk
- 14. Keekada

- 15. Triumph
- 16. The Pictures
- 17. Przystanek Chmielna
- 18. Intimissimi
- 19. Renato Nucci
- 20. Sphinx
- 21. Matras
- 22. Plus
- 23. Vincent
- 24. Grycan
- 25. Vacant
- 26. Milanówek
- 27. In Medio
- 28. Smyk

- 29. Kebab King
- 30. Perugia
- 31. Chmiel Cafe
- 32. Fendo Obuwie
- 33. De'lux Optica
- 34. Sklep spożywczy
- 35. Apteka Sawa
- 36. Wzorcownia
- 37. Gold Mark
- 38. Kino Atlantic
- 39. Coffeeheaven

- 40. Yves Rocher
- 41. Sioux
- 42. Nike
- 43. Dedalus
- 44. Kaktus Ice cream
- 45. Vacant
- 46. Vacant
- 47. Bonjour Vietnam
- 48. Nail Care
- 49. Zapiékanki.pl
- 50. Ekologiczne wypieki
- 51. Organique
- 52. Vacant
- 53. Przychodnia

- 54. Mela Verde
- 55. Cepelia
- 56. by Insomnia
- 57. Jan Kielman
- 58. Złoto Srebro
- 59. Lilian
- 60. Taurus
- 61. Styloskop
- 62. Bonito.pl
- 63. Stara Mydlarnia
- 64. Bubble Tea 7
- 65. 4 eyes optyka
- 66. Cukiernia Nenetta
- 67. Vacant

shoppers to this street, namely Orsay, Tatum, Grycan, Green Caffé Nero. A number of well-located premises are offered for sale and for refurbishment on Chmielna Street. Once investors start believing in the success of high street projects, there are good chances for Chmielna to be revived. The recent traffic regulations leaving almost no space for cars on Chmielna is forecasted to increase pedestrian traffic and give a boost of energy, turning Chmielna into the 'place to be'.



- 68. Kantor
- 69. Rajstopy
- 70. Vacant
- 71. Luka Bandita
- 72. Town Burger
- 73. Flow
- 74. Orsay
- 75. Douglas
- 76. Rossmann
- 77. Vero Moda
- 78. Aroma Espresso Bar
- 79. Równonoc
- 80. Chillout Factory
- 81. Ryłko

- 82. Pho Toan
- 83. Citi Sport
- 84. Elizabeth boutique
- 85. Futra Kuźniczy
- 86. Grażyna Edgare
- 87. Minus music club
- 88. Tesoro
- 89. Kantor
- 90. Charms
- 91. Thomas Outlet
- 92. Malinowe Obcasy
- 93. Karmello
- 94. Cukiernia Sowa
- 95. Kantor

- 96. Parfois
- 97. Cevap
- 98. Metro Shoes
- 99. Vacant
- 100. Hobo Bag
- 101. Vacant
- 102. Cukiernia Pawłowicz
- 103. Ekologiczne Wypieki
- 104. Li Parie
- 105. Kultura Liberalna
- 106. Thomas
- 107. Artykuły dla zwierząt
- 108. Twoje Soczewki
- 109. Tatum

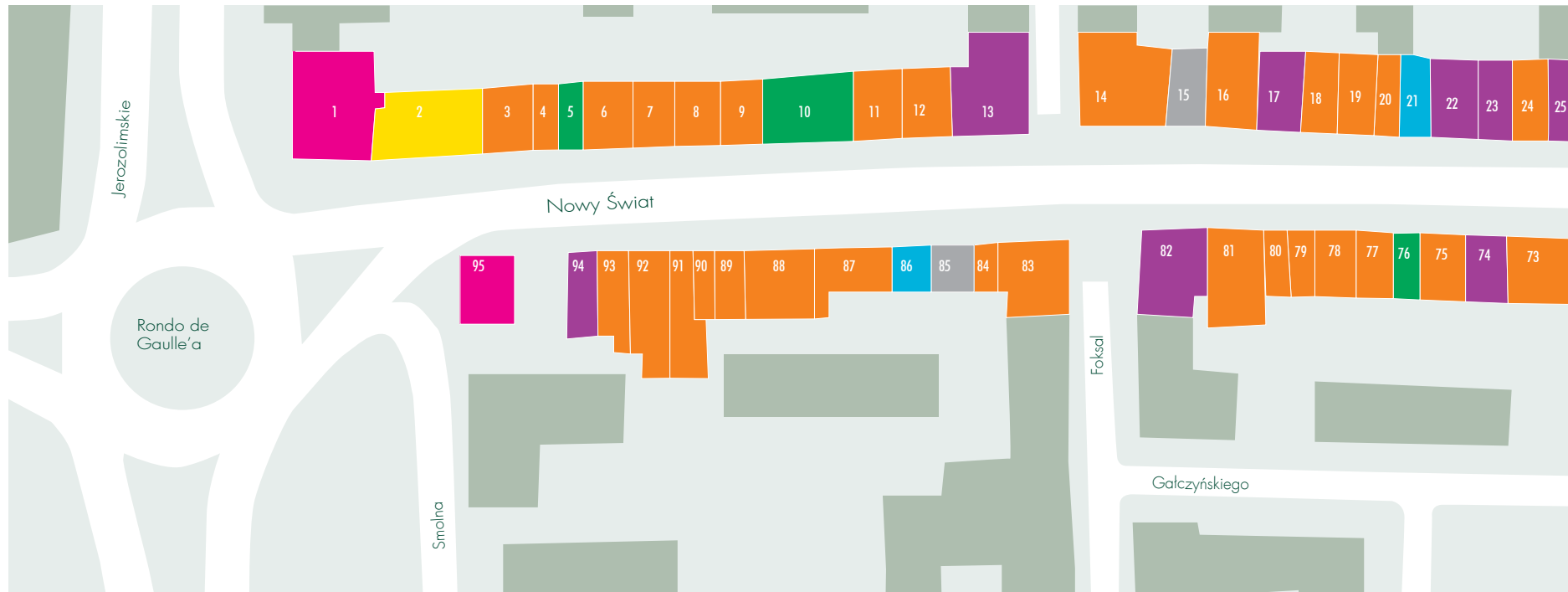
- 110. Cava
- 111. La Fiesta
- 112. Antyki
- 113. Meta!
- 114. Vacant
- 115. Vacant
- 116. Opasy Tom Piw
- 117. Chianti
- 118. Kameralna
- 119. Teatr Sabat
- 120. Papaya
- 121. Foksal Factory
- 122. Foksal XVIII
- 123. Socjal



NOWY ŚWIAT

The most recognizable of Warsaw's high street locations – Nowy Świat not only hosts a wide range of international retailers, but also – thanks to its pedestrian character (it is closed for private automobile traffic) – generates considerable interest as one of the major tourist destinations. Redeveloped in the 1950's in historical style, with its small scale landscaped street environment it is one of the most inviting shopping and eating areas of Warsaw.

Located between Jerozolimskie Avenue and currently modernized Świętokrzyska Street, Nowy Świat preserves the unique character of the city from before the war, with picturesque tenement houses and cobbled pavements. A considerable part of the tenant mix on Nowy Świat Street is composed of restaurants and cafes, reaching over 40% of the total number of tenants. Many of the eateries are designed with outdoor gardens, which create a unique atmosphere



1. Sephora
2. Empik
3. Costa coffee
4. Pijalnia Wódki i Piwa
5. Kwaciarnia
6. Kebab King
7. Manufaktura cukierków
8. Amatorska cafe
9. Buddha Indian Restaurant
10. TIGER
11. Petit Apetit
12. Besuto Sushi
13. Orsay

14. Flow
15. Vacant
16. Skok na Sok
17. Józefina
18. Blikle Cafe
19. Blikle Delikatesy
20. Czarno na białym
21. Orange
22. Frey Wille
23. Pandora
24. Familijny
25. Rinascimento
26. Księgarnia Leksykon
27. Croque Madame

28. L'Occitane
29. Ecco
30. Tea Herbaty
31. Insomnia
32. iSpace
33. Nespresso
34. Dawne Smaki
35. World box
36. Janira

37. Sam Spolem
38. Mimosa tkaniny
39. Delikatesy Spolem
40. Vacant
41. Kępk Leather & Bags
42. Grycan
43. Silver Line
44. Dedalus
45. Ichiban Sushi

and enhance Warsaw's night life. Apart from restaurants and cafes, grocery shops and fashion are the other outstanding categories of retailers on Nowy Świat, examples being Costa Coffee, Haagen Däazs and H&M.



- 46. McFit
- 47. Vacant
- 48. Zapiecek
- 49. Ingot
- 50. Zepter
- 51. LaCantina
- 52. Bierhalle
- 53. Vincent
- 54. Starbucks
- 55. Warta
- 56. Apteka

- 57. Frank Provost
- 58. Bollywood lounge
- 59. Tchibo
- 60. North Fish
- 61. Sopocki Dom Aukcyjny
- 62. Vacant
- 63. Green Cup
- 64. Hobo Bag
- 65. Desa Biżuteria
- 66. Galeria Wypieków
- 67. Coffeeheaven
- 68. Oto! Sushi
- 69. Specjały Regionalne
- 70. Bajka Cafe

- 71. Pizza Eataliano
- 72. So! Coffee
- 73. Sphinx
- 74. Ara
- 75. Ristorante Corleone
- 76. MGM Galeria Sztuki
- 77. Carpaccio
- 78. Häagen Dazs
- 79. Brooklyn Burgers
- 80. Cafe Cocktail Bar
- 81. Frida
- 82. H&M

- 83. Cava
- 84. Cukiernia R.Radzikowski
- 85. Vacant
- 86. Zegarmistrz
- 87. Viking Bar
- 88. Carrefour Express
- 89. Subway
- 90. Krakowski Kredens
- 91. Bistro & Burger Bar
- 92. Piotruś Cafe
- 93. Salad Story
- 94. Swiss
- 95. Apteka



PLAC TRZECH KRZYŻY

When considering shopping in Warsaw one of the most prestigious and recognizable locations is undoubtedly Trzech Krzyży Square. The VitkAc and Mysia 3 department stores that are situated in the immediate surroundings of the Square increase the profile of the location and raise its value.

There are four naturally shaped retail areas complementing the Square, each boasting well-known international brands and being retail destinations in their own right.

One of the areas is formed on Nowy Świat Street, covering numbers 1-7. On the way to the Square, the prestigious stores include Ferrari and Mont Blanc on the left side of the street, and COS, Muji, Max Mara, Pinko and Food&Joy on the right. On the left side of the Square, the ground floor of the Holland Park office building has long hosted many prestigious brands. As the building has been last transacted, the new investor will soon refurbish it creating even more retail units in a project

- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent



- | | | | | |
|---------------------------|----------------------|----------------------|------------------------|--------------------------|
| 1. Ermenegildo Zegna | 15. Sir Arthur | 19. Paola | 33. Bank Millennium | 46. Salamander |
| 2. AleGloria | 16. Minty Dot | 20. Deutsche Bank | 34. Optyk | 47. BZ WBK |
| 3. Burberry | 17. Galeria Wypieków | 21. Carolina Herrera | 35. Pinko | 48. Salewa |
| 4. Plac Trzech Krzyży 3/4 | 18. Mysia 3 | 22. Pestka | 36. Hustler | 49. Optyk Robak |
| 5. Poczta Polska | - COS | 23. PAP | 37. Intenso | 50. Ethos - soon opening |
| 6. Coffeeheaven | - Take a Nap | 24. Optique | 38. Max Mara | 51. VV.Kruk |
| 7. Vacant | - My Paris | 25. Stek Room | 39. La Casa del Habano | 52. Sheraton |
| 8. Butik optyczny | - Nenukko | 26. O'le | 40. Food & Joy | 53. Someplace Else |
| 9. Shoes&Co. | - UEG | 27. Szpilka | 41. Ferrari | |
| 10. Cool&Chic | - Berries & Co. | 28. Szpulka | 42. St. Dupont | |
| 11. Alkohole Świata | - Cookie | 29. Vacant | 43. Mont Blanc | |
| 12. Trade Room | - Muji | 30. Atelier Zablotny | 44. Park House | |
| 13. Avangarda | - Ufufu | 31. Vacant | 45. I Mad | |
| 14. Domowy Okruszek | - Leica | 32. Starbucks | | |



renamed as Ethos. It is not known which tenants will Ethos host yet, however it is expected that numerous prominent fashion brands would be located there. Balancing the fashion offer, there are various cafes located on the opposite side of the Square. Szpilka, and Szpulka are well-known to Warsaw shoppers, accompanied by Coffeeheaven (Costa Coffee) and Starbucks.

Last, but not the least retail area on Trzech Krzyży Square is located opposite to the church, on the corner of Ujazdowskie Ave. and Mokotowska Street, in Dom Dochodowy. This is the location for high-end fashion, where Burberry and Ermenegildo Zegna stores are located, accompanied by the AleGloria restaurant run by Magda Gessler.

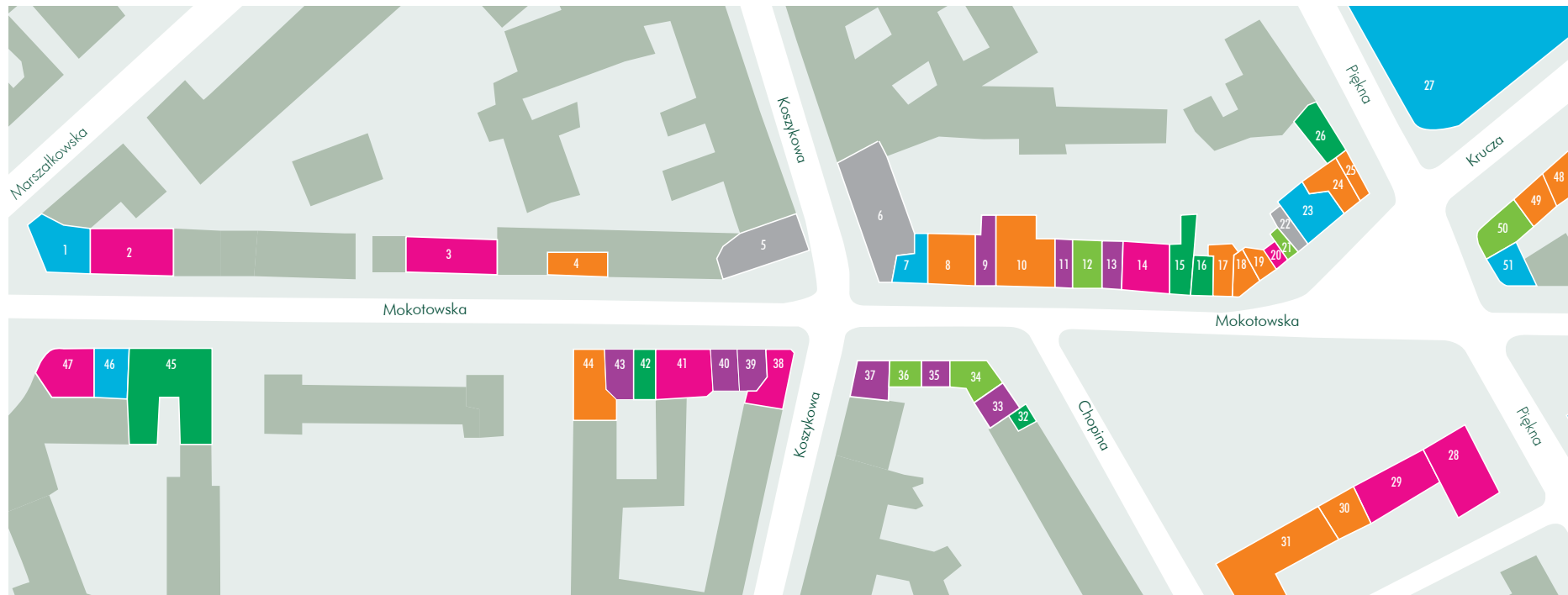
The significant amount of traffic that goes around the Square is the main obstacle for its further development. The various parts are not easily connected, a factor which complicates the mobility around the Square. However, there are plans to reorganize the streets and create a more pedestrian friendly area. Further good news is the planned expansion of the retail element in Holland Park which will take place in 2015. With those improvements, the Square should attract more interest among tenants and Warsaw shoppers.



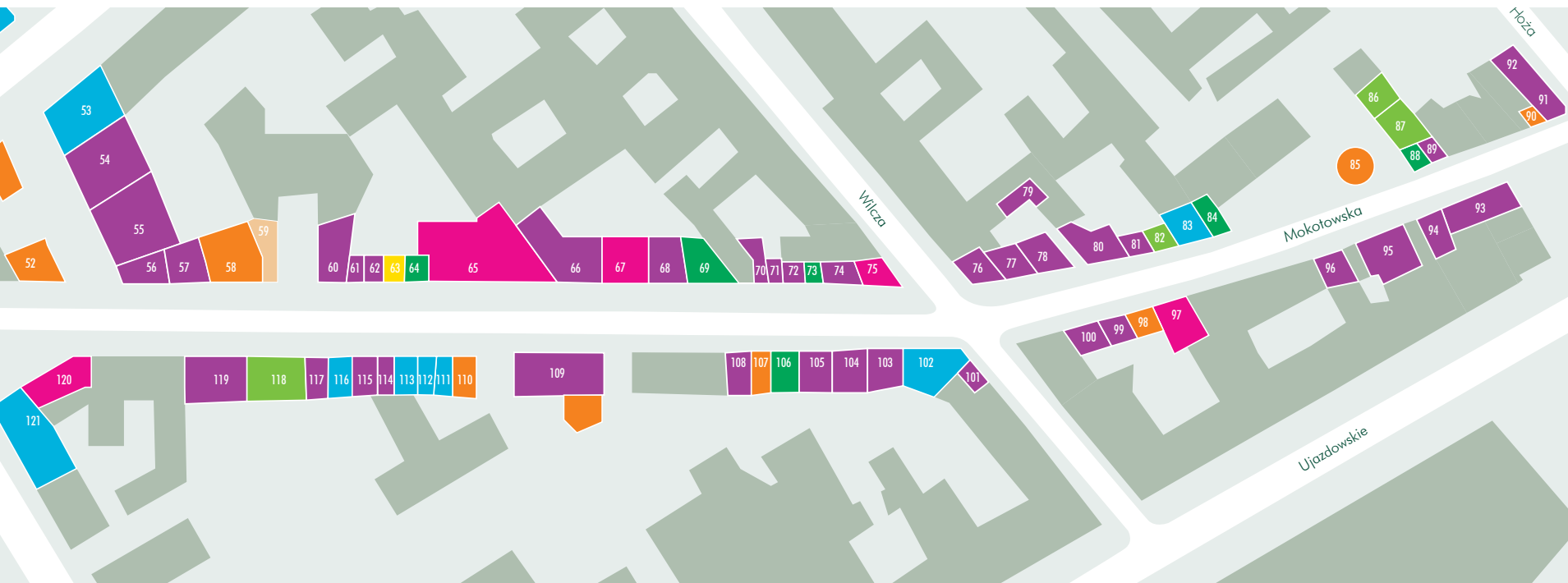
MOKOTOWSKA

Mokotowska boasts the position of the youngest retail location in the city. This is the entry point for national high-end fashion retailers; a place where many prominent Polish designers have decided to locate their atelier, such as Maciej Zień, Anna Kuczyńska or Robert Kupisz. Other than fashion, Mokotowska is a location for jewellery and accessories and a number of restaurants belonging to food stores, including Lilou or Flemming&Co.

Linking Trzech Krzyży and Zbawiciela Squares, Mokotowska creates a natural retail destination which is gaining in importance with every new retailer. Popular among the wealthy of Warsaw's society, the street retains its intimate character. Unfortunately the narrow pathways and parked cars are the main drawbacks of the street, even though it is only a one way street.



- | | | | | |
|--------------------------|---|------------------------------|----------------------------|----------------------------|
| 1. Raiffeisen Polbank | 15. Bukieciarnia | 28. Apteka | 42. Wulkan | 56. Escada |
| 2. Bartek Janusz | 16. FRSE -Fundacja Rozwoju Systemu Edukacji | 29. Apteka | 43. Veteran | 57. Marc Cain |
| 3. Tanie Apteki Rodzinne | 17. Champagne Bar | 30. Cukiernia W.Gieryszewski | 44. Mimino | 58. Bukieteria Roma |
| 4. Shabu Shabu | 18. Słodki Slony | 31. Flaming & Co. | 45. PCK | 59. Mimbla |
| 5. Vacant | 19. Petit Appetit | 32. Ruch | 46. Vacation express.pl | 60. See Me Boutique |
| 6. Vacant | 20. Okorama | 33. Walford/Roeckl | 47. Apteka | 61. Pracownia Futer |
| 7. Ksero Wydruki | 21. Maison Creative | 34. Flaming & Co Wear | 48. Green Caffè Nero | 62. Candy Crystal |
| 8. Społem | 22. Vacant | 35. Hefra | 49. Fine Wine & Spirits | 63. Księgarnia komputerowa |
| 9. Designer secret | 23. Kantor | 36. Snobissimo | 50. Bang & Olufsen | 64. Antykwariat |
| 10. Dyspensa | 24. Slony | 37. Casa mia | 51. Dom Maklerski Pekao SA | 65. Le Spa |
| 11. Fashion shop | 25. Salad story | 38. Nail & Beauty Bar | 52. Lounge | 66. Zień |
| 12. Art Manus | 26. Kwaciarnia | 39. Fumo | 53. BZ WBK | 67. Terra Spa |
| 13. Takie Buty | 27. Raiffeisen Bank | 40. Me Amore | 54. Chiara | 68. Agent Provocateur |
| 14. Kerastase | | 41. Salon Optyczny | 55. Le Chic | 69. Galeria Sztuki |



- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent

70. Unisono
 71. Lniany zaulek
 72. Kuczyńska
 73. Kwiaciarnia
 74. Just Paul
 75. Mako 61
 76. Atelier Makotowska 63
 77. Be My Lilou
 78. HOS&Me
 79. Blind Concept Store
 80. Lilou
 81. Paski Zegarki
 82. Bęc Zmiana
 83. Itaka

84. Aromatherapy Gifts
 85. Adler
 86. Antiquites
 87. Makotowska 71
 88. Ruch
 89. Jubiler
 91. Tods
 92. Valentino
 93. Burberry
 94. 10m2 Italian Design
 95. Catimini
 96. Wearso. Organic
 97. Make Up Forever

98. Za piecem
 99. Together
 100. Tomasz Ossoliński
 101. Peticado
 102. Lion's Bank
 103. Makobelle
 104. Loft 37
 105. Lullaby
 106. La Sal Gallery
 107. Przegryź
 108. Karpiński Jewellery

109. Makotowska 48
 - Eugen Klein
 - Lewanowicz
 - Diran Anouchikian
 - Robert Kupisz
 - Alewino.pl

110. Społem
 111. Idea Bank
 112. Krzysztof
 113. Oprawa Obrazów
 114. Paryżanka
 115. Mood Boutique
 116. Fryzjer Wojciech Zieliński
 117. JoCoCo
 118. Rodart
 119. Bagatt
 120. Rossmann
 121. Nordea Bank



PLAC ZBAWICIELA & PLAC KONSTYTUCJI

Zbawiciela Square is favorably located at the crossing of Mokotowska, Marszałkowska and Nowowiejska Streets.

Being the new mecca for bohemian Warsaw, Zbawiciela Square has established its position as a destination for breakfasts, lunches and dinners in picturesque and intimate scenery. Being the location of mid-nineties grocery and artisan shops no more than few years ago, Zbawiciela Square has developed its unique character

thanks to such eateries and pubs as Charlotte, Karma or Plan B. The coexistence of the food offer with the soul of the nineties present in the Corso restaurant or a key craftsman shop 'Klucze' adds to the uniqueness of the Square.

It is expected that Zbawiciela Square will strengthen its position as a recognizable location for restaurants and cafes, spreading along the surrounding streets.

- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent



1. Ministerstwo Kawy
2. Bastylia
3. Izumi Sushi
4. Karma
5. Tuk tuk
6. Que Hong
7. Heritage
8. Rossmann
9. Grand Prix Alkohole
10. Vacant
11. Triumph
12. Gorąco Polecam
13. Mleczarnia Jerozolimska
14. Piekarnia Grzybki

15. Kolporter
16. Antyki
17. Vacant
18. Corso
19. Reiffeisen Bank
20. Apteka
21. Metodyści
22. Charlotte
23. Plan B
24. Rajstopy
25. Zegarmistrz
26. BZ WBK
27. Funky Studio
28. Ruch

29. Super-Pharm
30. Vacant
31. Alkohole
32. MDM Galeria Sztuki
33. RTV Euro AGD
34. Suparom
35. Royal Collection
36. Restauracja Lanse
37. Pulp Fiction
38. Itaka
39. Galeria Test
40. MDM Galeria Mody
41. Desa Unicum
42. Vacant

43. Pini
44. Merlin
45. PKO BP
46. Meble Dywany
47. Getin Bank
48. Mito Gallery
49. Kantor
50. Chłopskie Jadło
51. Szwejk

52. Hotel MDM
53. Green Caffè Nero
54. Poczta Polska
55. Saffron Spices
56. Paris Optique
57. Okręgowa Izba Radców Prawnych
58. Galeria Bielizny
59. Riff
60. Vacant
61. Buty włoskie
62. Batida
63. Dom Chleba
64. KFC

65. Deutsche Bank
66. Play
67. Millenium Bank
68. Orange
69. W.Kruk
70. Vacant
71. Centrum Komunikacji Społecznej
72. Pub Konstytucja
73. Neckermann
74. Las Rąk
75. Pierrigeria
76. Desa Unicum

Konstytucji Square, linking Marszałkowska, Piękna, Koszykowa and Waryńskiego Streets is a unique place with historical meaning. The social realism architecture on two sides of the square, with monumental arcades hosts various retailers of both national and international origin. The area of Konstytucji Square is dominated by services and restaurants, although some retailers from other categories such as fashion are present here as well.

Among the restaurants present there are U Szwejka, Batida, KFC, Green Caffè Nero. Services are represented by Paris Optique, Orange, and various bank branches.

There is a retail future for the Square, although this is greatly restricted due to the significant amount of parking located in the heart of it. The square hosted many events over the past two decades, such as concert, social actions and theatre performances.





MARSZAŁKOWSKA

Historically one of the first retail streets in Warsaw linking the north and south of the city – Marszałkowska, retains its position as one of the most recognizable shopping destinations. Developed mostly in 1950's and 1960's style its urban concept boasts some fine examples of socialist architecture with some of the largest retail units and a number of department stores. Among this monumental style, there are 19th century tenement houses woven, which are also adapted for retail purposes. With Wars, Sawa, Junior department stores stretching along Marszałkowska

from Świętokrzyska Street to Jerozolimskie Avenue, to various shops, restaurants and services located to the east of the city centre, reaching Konstytucji Square, Marszałkowska boasts a variety of retail outlets. The Wars, Sawa, Junior stores are the location for well-established national and international brands, naming Marks&Spencer, Zara, H&M or Empik among the most prominent ones. The eastern part of the street remains services-oriented, with single restaurant units



- 1. Botida
- 2. Vacant
- 3. Złota Kurka
- 4. BZ WVBK
- 5. Vacant
- 6. Bierhalle
- 7. Optyk
- 8. Izis
- 9. Vacant
- 10. Urząd Miasta
- 11. Skandia Ubezpieczenia
- 12. Klucz Mobile
- 13. Sex Shop Erotic Fashion
- 14. Czeski sklep

- 15. Sarenka
- 16. Kebab Alibaba
- 17. Millennium Bank
- 18. Sodium outlet
- 19. BNP Paribas Bank
- 20. T-Mobile
- 21. Bubble Tea
- 22. Alior Bank
- 23. Sklep spożywczy
- 24. Lombard
- 25. Epapierosy Ebul
- 26. Kasa Stefczyka
- 27. Credit Agricole
- 28. Vacant

- 29. Dayli
- 30. Getin Bank
- 31. Idea Bank
- 32. Vacant
- 33. Nordea
- 34. The British Business Centre
- 35. PKO BP
- 36. Fresh Point
- 37. Bake & Cake
- 38. Cepelia

- 39. Green Caffè Nero
- 40. Vacant
- 41. Raiffeisen Polbank
- 42. Marcpol
- 43. Xero
- 44. Browar de Brasil
- 45. BOS Bank
- 46. Lux Spolem
- 47. Dom Maklerski
- 48. Rossmann
- 49. VINO Trio
- 50. TVN Cafe
- 51. Księgarnia
- 52. 7 Mil

(such as Batida, Green Caffè Nero), and fashion outlets (Janira, 7mil, Royal Collection).

Marszałkowska, being a wide 6 lane street, lacks intimate character, although the presence of parking places is a doubtless advantage for those customers travelling by car.

Marszałkowska will significantly strengthen its position once Sezam and the Qualia building in Sienkiewicza Street take advantage of their retail potential.

Qualia's investment will offer retail units on the ground floor of the mixed use scheme, naturally extending the retail area of Pasaż Wiecha and stretching it to Świętokrzyska Street. The full potential will be realized once the street becomes more pedestrian-friendly with narrowing the street, modernization of Rondo Dmowskiego and the development of Plac Defilad with museums, retail stores and public spaces, as the Master Plan assumes.



- 53. Noble Bank
- 54. Parana
- 55. BNP Paribas Bank
- 56. Nordea
- 57. Odzież na wagę
- 58. Secado
- 59. Malpka Express
- 60. La Marie Salon Sukien Ślubnych
- 61. Viadem Kantor Biżuteria
- 62. Intimissimi
- 63. Bank Pekao SA
- 64. Belloebuono
- 65. Vacant
- 66. Kasa Wspólnota

- 67. Plus
- 68. Apteka Hibiskus
- 69. Nieruchomości Strzelczyk
- 70. Odzież na wagę
- 71. Lider Kebab
- 72. Teatr Polonia
- 73. Zabawki
- 74. Vacant
- 75. Kwiaciarnia
- 76. Dom Chleba
- 77. KFC
- 78. PKO BP

- 79. Wars
 - H&M
 - C&A
 - InMedio
 - Carrefour
 - TK Maxx
- 80. Sawa
 - Reserved
 - Rossmann
 - Marks & Spencer
 - Swatch
 - iSpot
 - Camaieu

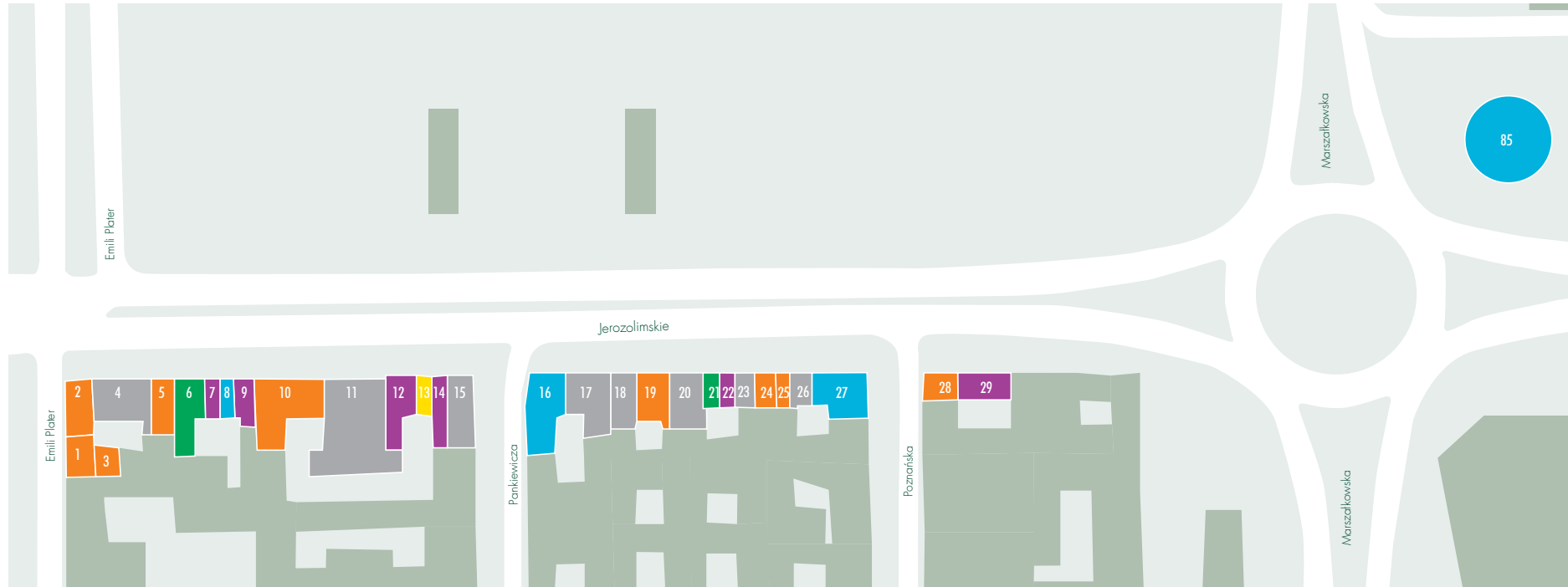
- 81. Junior
 - Cropp
 - House
 - Empik
 - Sephora
 - Zara
- 82. PKO BP
- 83. Green Caffè Nero
- 84. Sezam
- 85. McDonald's

JEROZOLIMSKIE AVENUE



Jerozolimskie Avenue, being one of Warsaw's longest streets, runs throughout the city centre with Chmielna and Nowy Świat Streets on the left and Mokotowska Street with Zbawiciela Square on the right. The central section of the street, spread between Emilii Plater and Nowy Świat Streets has served as a retail destination for decades and has become a well-established location for many recognizable retailers. This shopping street boasts some large units but creates a relatively difficult shopping environment.

The main category of retailers is gastronomy – Jerozolimskie Avenue is a location for restaurants (Vapiano, Izumi sushi, Sphinx), cafes (Starbucks, Coffeeheaven) and fast food (KFC, Subway, Fresh Point). Services create another rich offer here – hairdressers, bank branches and mobile phone operators are present in all parts of the Avenue. W.Kruk, Kelly Melu, Apart, Aren jewellery stores and many shoe shops (Vans, Converse, Salamander) are other popular categories of retailers in Jerozolimskie Avenue.



- | | | |
|--------------------|-------------------------------|------------------------|
| 1. Vapiano | 15. Vacant | 29. Strauss Restaurant |
| 2. Starbucks | 16. BZ WBK | 30. Coffeeheaven |
| 3. Izumi Sushi | 17. Vacant | 31. Jubiler |
| 4. Vacant | 18. Vacant | 32. Subway |
| 5. Lion's Gate | 19. Kim Pho | 33. Santander |
| 6. British Council | 20. Vacant | 34. Mannari |
| 7. Gorseciarstwo | 21. Polski Związek Szachistów | 35. Deutsche Bank |
| 8. Kantor | 22. Martensy | 36. Apart |
| 9. 7 mil | 23. Vacant | 37. Vacant |
| 10. Carrefour | 24. Delikatesy Jerozolimskie | 38. Bank BPH |
| 11. Vacant | 25. Piekarnik | 39. Credit Agricole |
| 12. Vans | 26. Vacant | 40. Eventim |
| 13. Bookland | 27. Play | 41. Jean Louis David |
| 14. Soul | 28. Janira | 42. Stępczyk |

- | |
|-----------------|
| 43. Skok na sok |
|-----------------|

Jeruzolimskie Avenue's retail offer can be divided into two naturally shaped parts. The western part of the street, stretching from Emilii Plater Street to Marszałkowska Street is less developed and notes higher vacancies. This is partly caused by the fact that the street is build up only on the south side. This section of the street could offer development potential once the 19th century tenement houses located there are refurbished as Pasaż Lipińskiego already is. The second section of the street runs from Marszałkowska Street to Nowy Świat Street and it is redeveloped in a socrealistic style. It is well positioned to improve its image by refreshing brands and

shops that have been located there for ages. The opening of Louis Vuitton and the redevelopment of Smyk are the first signs of such a transformation.

Smyk, serving as CEDET department store for decades is soon to undergo a refurbishment and will offer over 2,000 sq m of retail area in a mixed-use project developed by CD&I and planned to preserve its old character it used to have as CEDET. This, together with the tenant mix located in VitkAc department store is forecasted to create a destination out of Jeruzolimskie Avenue.



- 44. Andrzej Jedynak
- 45. Carrefour Express
- 46. Między Bułkami
- 47. 1 minute
- 48. Aptekarz Warszawski
- 49. Jubiler
- 50. KFC
- 51. Fresh Point
- 52. W. Kruk
- 53. Hebe
- 54. Millennium Bank
- 55. Vacant
- 56. Apteka Cefarm

- 57. VitkAc
 - Bottega Veneta
 - Diesel
 - Gucci
 - Lanvin
 - Likus Concept Store
 - Louis Vuitton
 - Saint Laurent Paris
 - Gucci Kids
 - Stella McCartney Kids
 - Alexander McQueen
 - Celine
 - Chloe
 - Christobal Balenciaga

- Diane von Furstenberg
- Dsquared2
- Emporio Armani
- Giorgio Armani
- Givenchy
- MCQ
- Paul Smith
- Stella McCartney
- Brioni
- Concept 13
- Delikatesy 13
- Vinoteka 13
- Bar 13
- Bar Szampański 13

- 58. PKO BP SA
- 59. Mamma good food
- 60. Zapiecek
- 61. Antykwarjat
- 62. Życie Warszawy
- 63. Medincus
- 64. Getin Bank
- 65. Mleczarnia Jeruzolimska
- 66. ING Bank
- 67. City Handlowy
- 68. Alior Bank
- 69. Orbis
- 70. Green Caffè Nero
- 71. CEDET

- 72. Rossmann
- 73. Bulldog
- 74. Kebab King
- 75. Hest
- 76. Kava & Vino
- 77. Aren
- 78. Carrefour Express
- 79. Kiosk
- 80. Gerda
- 81. Kelly Melu
- 82. Prestige
- 83. Salamander
- 84. Sphinx
- 85. PKO BP SA

KRAKOW

HIGH STREET

High streets in Krakow differ from the ones in Warsaw, both in terms of scale and character. Krakow, which was visited by 9,25 million tourists in 2013, has streets surrounding the Main Square shaped in a specific way. As tourism is considered to be a driving force behind the development of high streets, this rule perfectly applies to Krakow.

Dating back to the 13th century, the Main Square is surrounded by stylish old townhouses hosting all sorts of services, from elegant restaurants, through music bars and book stores, to banks and grocery shops. A Cloth Hall (Sukiennice), one of Krakow's graces has been serving as a shopping mall since the 14th century and nowadays hosts a market for souvenirs and jewellery.

The Krakow high street area is organized around the Main Square and the surrounding streets, where Floriańska, Grodzka and Szewska Streets are in the lead. The main category of tenants, due to the touristic character of the place, are restaurants and cafes, scattered around the Main Square with the elegant and unified gardens and umbrellas creating a wreath around the Square, with further similar facilities numerously present on the Main Market's streets.

Jewellery and accessories shops are also widely present on Krakow's high streets, followed by fashion stores of both national and international origins. Despite the city's popularity and attractiveness, there is a shortage in the number of international brands in Krakow, both from the accessories and fashion sectors. This results from the lack of adequate retail units that could host such tenants. However, the situation is gradually changing and investors have become more aware of the possibilities of the city, which is clearly visible by the growing number of renovation projects.





CBRE



FLORIAŃSKA

One of the oldest streets in Krakow, Floriańska has served as a retail location since the end of 18th century, when the first hotels and restaurants appeared, changing the residential character of the street.

Linking the Main Square with the historical Florian Gate to the north of the city centre, Floriańska has served as a retail location for decades, and retains its

character. It hosts over 20 restaurants and cafes, both chain (KFC, McDonald's, Costa by Coffeeheaven, Karmello) and local (Zapiecek, Trattoria Prima, Jama Michalika). Another noteworthy category of retailer on Floriańska Street is jewelers – 10 shops are dedicated to this type of goods, with a strong representation of Svarowsky and other brands such as Accessorize, Parfois and Six. Fashion is represented by only 8 international retailers (i.e. Orsay, Promod, Camper).



- 1. Coffeeheaven
- 2. McDonald's
- 3. Brama Hostel
- 4. Harpers shoes
- 5. Kantor
- 6. Vacant
- 7. Kantor
- 8. Sklep Spożywczy
- 9. Moda Damska
- 10. Emerald
- 11. Voigt
- 12. Jama Michalika
- 13. Beer House
- 14. Hebe

- 15. Dom Jana Matejki
- 16. Aurarius
- 17. Madonna
- 18. Kebab
- 19. Kantor
- 20. Orsay
- 21. Vacant
- 22. Biuro Podróży
- 23. Świat Książki
- 24. Jubiler
- 25. Krakow Souvenirs
- 26. Karmello
- 27. Hotel Floryan
- 28. Biuro Podróży

- 29. Tally Weijl
- 30. Carton Shop
- 31. Moda Damska
- 32. Krakow Souvenirs
- 33. The Mexican
- 34. Douglas
- 35. Rossmann
- 36. Piwnica pod Złotą Pipą
- 37. Świat Burszyny
- 38. Emerald
- 39. Vacant
- 40. Bielizna Barbara

- 41. KFC
- 42. Six
- 43. Pamiątki
- 44. Accessorize
- 45. Hostel
- 46. Pamiątki
- 47. Malinowo Music Club
- 48. Muzeum Farmacji
- 49. Rylko
- 50. Alkohole
- 51. Futra
- 52. Gościniec Floriański
- 53. Twoje Soczewki
- 54. Sephora

Floriańska Street is gradually changing and, apart from the long established retail locations, there is a growing number of renovated tenement houses, which once upgrading their area and value, will soon host new tenants.



- 55. Calzedonia/Intimissimi
- 56. Gruzjińskie Chaczapuri
- 57. Kebab
- 58. Sultan Shisha
- 59. Parfois
- 60. Pasaż Floriańska 24
- 61. I <3 Kraków
- 62. Lola Lola
- 63. Sklep z pamiątkami
- 64. Pasaż Handlowy
- 65. Zapiecek
- 66. Hand Made in Kraków
- 67. Staropolskie trunki
- 68. Promod

- 69. Touch
- 70. Lilo
- 71. Soon opening
- 72. Hotel pod Różą

- 73. Pizza Vera
- 74. Rodzinka Cafe
- 75. Diverse
- 76. Desa
- 77. Trattoria Prima
- 78. Aggi
- 79. La Strada
- 80. Souvenirs
- 81. Camper
- 82. Hostel HeyNow
- 83. Souvenirs
- 84. Jazz Club u Muniaka
- 85. Kebab
- 86. Kantor

- 87. Castor Coffee Club
- 88. Swarovski
- 89. Pizza Sycylia
- 90. Della Moda Italiana
- 91. Cocomo Club
- 92. Złota Róża
- 93. Donna Piu
- 94. Jubiler
- 95. Bank Pekao SA

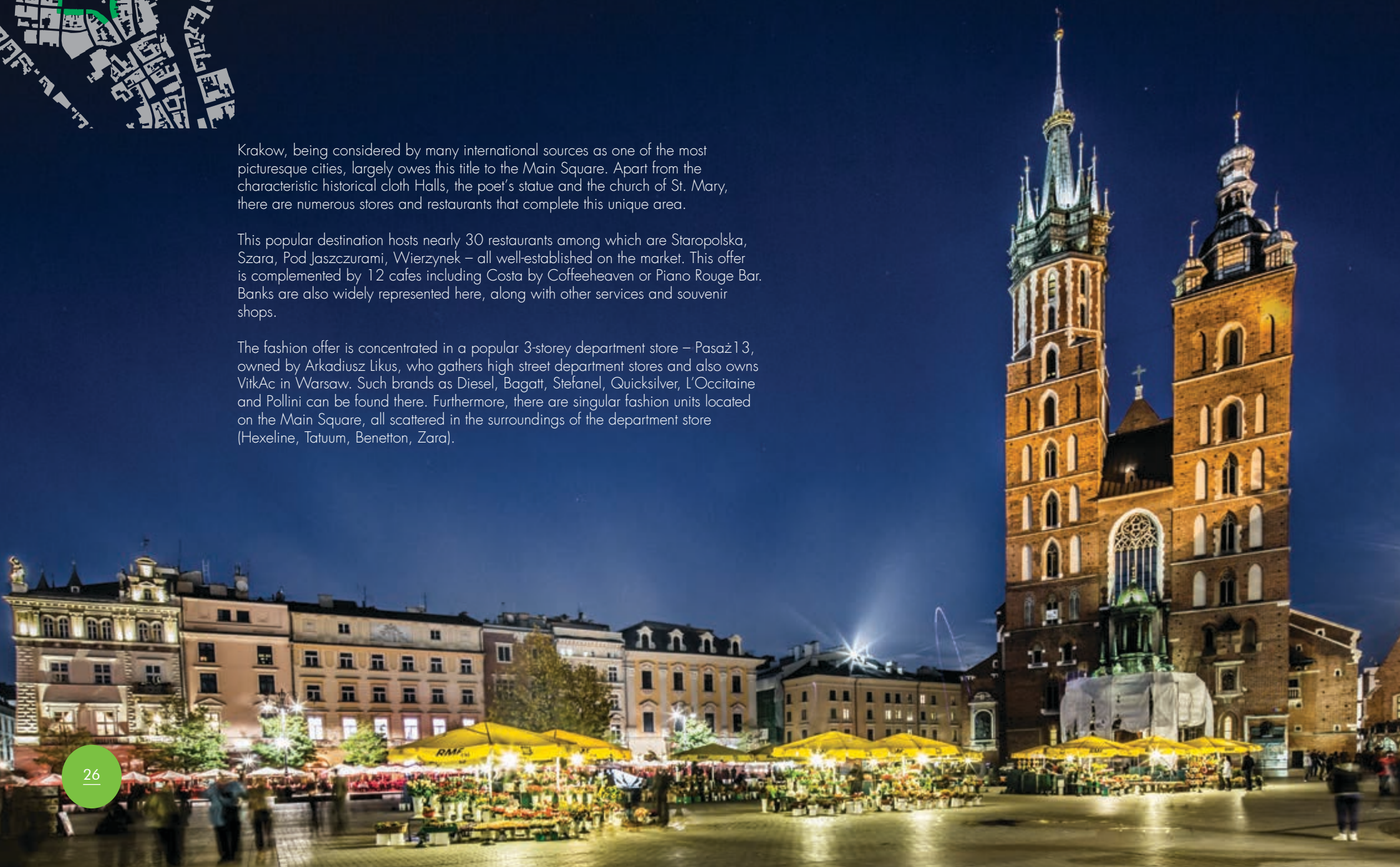


MAIN SQUARE

Krakow, being considered by many international sources as one of the most picturesque cities, largely owes this title to the Main Square. Apart from the characteristic historical cloth Halls, the poet's statue and the church of St. Mary, there are numerous stores and restaurants that complete this unique area.

This popular destination hosts nearly 30 restaurants among which are Staropolska, Szara, Pod Jaszczurami, Wierzynek – all well-established on the market. This offer is complemented by 12 cafes including Costa by Coffeeheaven or Piano Rouge Bar. Banks are also widely represented here, along with other services and souvenir shops.

The fashion offer is concentrated in a popular 3-storey department store – Pasaż13, owned by Arkadiusz Likus, who gathers high street department stores and also owns ViitAc in Warsaw. Such brands as Diesel, Bagatt, Stefanel, Quicksilver, L'Occitane and Pollini can be found there. Furthermore, there are singular fashion units located on the Main Square, all scattered in the surroundings of the department store (Hexeline, Tatum, Benetton, Zara).





1. Bank Pekao SA
2. Kawiarnia Bankowa
3. The Piano Rouge
4. Pijalnia Czekolady E.Wedel
5. Sopocki Dom Aukcyjny
6. Vintage
7. Virtuoso
8. Klub Shark
9. Aparthotel Betmanowska
10. Staropolska Karczma
11. Restauracja pod Słońcem
12. Antyki
13. Ulala Cukiernia
14. Milano Ristorante
15. Kantor
16. Łoża Klub Aktora
17. Coffeeheaven
18. Vacant
19. Hexeline
20. Chopin Restaurant
21. Galeria Niuan
22. Redalfi
23. Tatum
24. Kurant Księgarnia Muzyczna
25. Vacant
26. Apteka
27. Sklep Muzeum Historycznego
28. Europejska
29. Hawelka
30. Delikatesy 24h
31. Sklep Spożywczy
32. Księgarnia Pałac Spiski
33. Wawel
34. Bank Pekao SA
35. BZ WVBK
36. Tourist Information
37. Studio Fryzjerskie Framesi
38. Komisariat Policji
39. Vis a Vis
40. Harris Piano Bar
41. Dobra Kasza Nasza
42. Zbójcy w Palacu
43. Aida Cafe
44. Bistro Krakowskie
45. Vacant
46. Galeria MCK
47. Yummie
48. Arlekin
49. Bunga Bunga
50. Księgarnia Matras
51. Sioux
52. Pizza Dominium
53. Bank PKO BP
54. Deutche Bank
55. Jubiler
56. Hotel Wentzl
57. Marcello
58. Stodki Wentzl
59. Max 18
60. Da Pietro
61. Souvenirs
62. Vacant
63. Grande Grill
64. Wierzynek
65. Restauracja Tradycja
66. Stodki Wierzynek
67. Dom Polonii
68. L'Occitane
69. Diesel
70. Pasaż 13
71. Likus Concept Store
72. Adventure Sports
73. Vinicio Pajaro
74. Cafe Malaga
75. United Colors of Benetton
76. Restauracja Wesele
77. Podwórko Maryny
78. Klub Pod Jaszczurami
79. Skład alkoholi i cygar
80. Pasaż Handlowy
81. Zebra
82. Bar Szara
83. Zara
84. Hard Rock Cafe
85. Sukiennice

- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent

SZEWSKA

Szewska Street runs north-east from the main market and once served as a tram route leading to the city centre. Today it is entirely pedestrianized and hosts numerous international and national retailers. Szewska is changing its character and gaining in importance as it has recently become perceived as a newly created retail destination. It is becoming extremely popular among young people, particularly due to the presence of 6 music clubs. Additionally, shoppers can

choose from around 15 eateries and cafes, both fast food (McDonald's, Subway and Kebabs) and restaurants (Boscaiola, Al Capone). The night life of Krakow, widely present on the Main Square is naturally moved west towards Szewska Street, which is bursting and lively until early morning thanks to the music clubs supported with the overnight food offer.

- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent



- | | | | |
|------------------------------|-------------------------------------|---------------------------|----------------------------|
| 1. Al Capone | 15. Antyki przy Szewskiej | 29. Pierre | 43. Calzedonia |
| 2. Vacant | 16. Cukiernia Sowa | 30. Coctail Kama | 44. Intimissimi |
| 3. Kebab | 17. Residence 9 | 31. Boscaiola | 45. Kawiarnia u Zalipianek |
| 4. Pasta Risto | 18. Krakuska | 32. Zegarmistrz | |
| 5. Herbapol | 19. Krakowska Manufaktura Czekolady | 33. Piec Art Music Club | |
| 6. Pierogarnia Krakowiaczy | 20. Frantic club | 34. Vacant | |
| 7. Jazz Faust cafe | 21. Carrefour Express | 35. Rin Music Club | |
| 8. Kantor | 22. Księgarnia na Szewskiej | 36. Bistro pod Aniolkami | |
| 9. Vacant | 23. Pekao BP | 37. Kwaciarnia | |
| 10. Kobe | 24. BZ WBK | 38. Subway | |
| 11. Kebab | 25. McDonald's | 39. Hard candy music club | |
| 12. Kwadrat | 26. Optyk | 40. Żabka | |
| 13. Piekarnia pod telegrafem | 27. Kebab Mudi | 41. Pijalnia wódki i piwa | |
| 14. Ravel | 28. Gino Rossi | 42. Jean Louis David | |



GRODZKA

Grodzka Street is one of the longest city central retail streets, stretching south from the Main Square. Along with the picturesque church of St. Peter & Paul, it hosts a considerable number of retail units. The most popular category of retailer on Grodzka Street is definitely restaurants and cafes. Many recognizable eateries are located here, including Miód Malina, Sphinx, Pod Temidą, being only three examples among the choice of over 30 restaurants and cafes.

Over 10 fashion retailers add to the character of the street, with such top fashion brands as Paul & Shark, Max Mara and Escada. The street is also a popular location for jewellery stores, with a choice of 10 stores being available (i.e. Pandora, I am, Red Rubin).

- Services
- Health & Beauty
- Fashion
- Leisure
- Food
- Home & Interior
- Other
- Kids
- To rent



Rynek Główny

Grodzka



Plac Wszystkich Świętych



Plac Dominikański

Grodzka

Poselska



Plac Wszystkich Świętych

Poselska

1. Inna Outlet
2. Cafe Zakątek
3. Exchange "Gold"
4. Souvenirs
5. Max Mara
6. Mirage
7. Grodzka 4 Apart House
8. Polskie Dania
9. Antyki Desa
10. Koronki i Kapelusze
11. Antyki
12. Paul & Shark
13. Toruńskie Pierniki
14. Yves Rocher

15. Angel Fashion
16. Tourist Information Point
17. Hair style
18. Alkohole 24h
19. Pronto Pizzeria
20. Vacant
21. Gruzzińskie Chaczapuri
22. Marmolada
23. Hotel Rezydent
24. Krakowski Kredens
25. Exchange
26. Polskie Czapki
27. Hotel Rezydent
28. Akropolis

29. Pub
30. Hotel Jan
31. Vivien
32. Exchange
33. Aparthotel
34. Krakow Souvenirs
35. Accessories & Jewellery
36. I am
37. Mirage
38. Lokaah
39. Karmello





40. Prozak Club
41. Pizzeria
42. Apteka
43. Asia To Go
44. Tourist Information
45. Conhpol
46. Click Fashion
47. Pasaż Handlowy Home Design
48. Interior Fashion
49. Apteka
50. Gospoda Grodziska
51. World of Amber
52. Fabryka Cukierków
53. Ara

54. Kantor
55. Pandora
56. Tourist Information
57. Kebab Star
58. India Shop
59. Red Rubin
60. Figaro
61. Galeria Mariana Gologórskiego
62. Jubiler
63. Szewc
64. Caterina
65. Lody Tradycyjne
66. Souvenirs
67. Voigt

68. By Insomnia
69. Restauracja Pod Aniolami
70. Lampy Tradycyjne
71. Balaton Restauracja
72. Miód Malina
73. Wit Swosz



HIGH STREETS STANDARD LEASE TERMS

	STATE-OWNED	INVESTMENT FUNDS AND INSTITUTIONAL COMPANIES	PRIVATE OWNERS
Lease length 	Fixed term of 3 or 10 years	5 years with an option for 10 years	Indefinite
Rent currency 	PLN	EUR	Flexible, usually quoted in EUR but payable in PLN
Rent level 	The highest bidder of the obligatory tender sets the rent level	Fixed according to the market conditions	Negotiable, depending on the lease conditions
Tenant incentives 	None	Fit-out contribution	Optional and flexible



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- Lease & rents renewals
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- Client strategy
- Marketing strategy

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- Valuation

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