



Cities at the Intersection

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Urbanisation

Demography

Technology

Infrastructure

Globalisation



3000
cities

over
150k
population



The Demographic Shift

13 super-aged societies by 2020

12 in Europe

>20% of people aged 65+

..aging is one of the **greatest** social and economic **challenges** of the 21st century



As of June 2011



Europe's Infrastructure Shortfall

New Value Capture - Strategic Land and Infrastructure Contracts?

GDP spent on infrastructure ↓ 17.3% in 2013



€2 trillion shortfall 2013 – 2020



Shortfall rising to €15 trillion by 2030



Infrastructure is a unique opportunity – but requires innovation, pan-European planning & private investment

Digital Infrastructure

Uberm, Google+, One Note, Evernote, SlideShark, TowIt, Poll everywhere, Coral gables, Bike Citizens, RobinHood, Periscope, Myspace, Foursquare





Revolution or Synchronicity?

A fusion of technologies
straddling the physical, digital
and biological worlds... velocity,
scope, and systems impact.

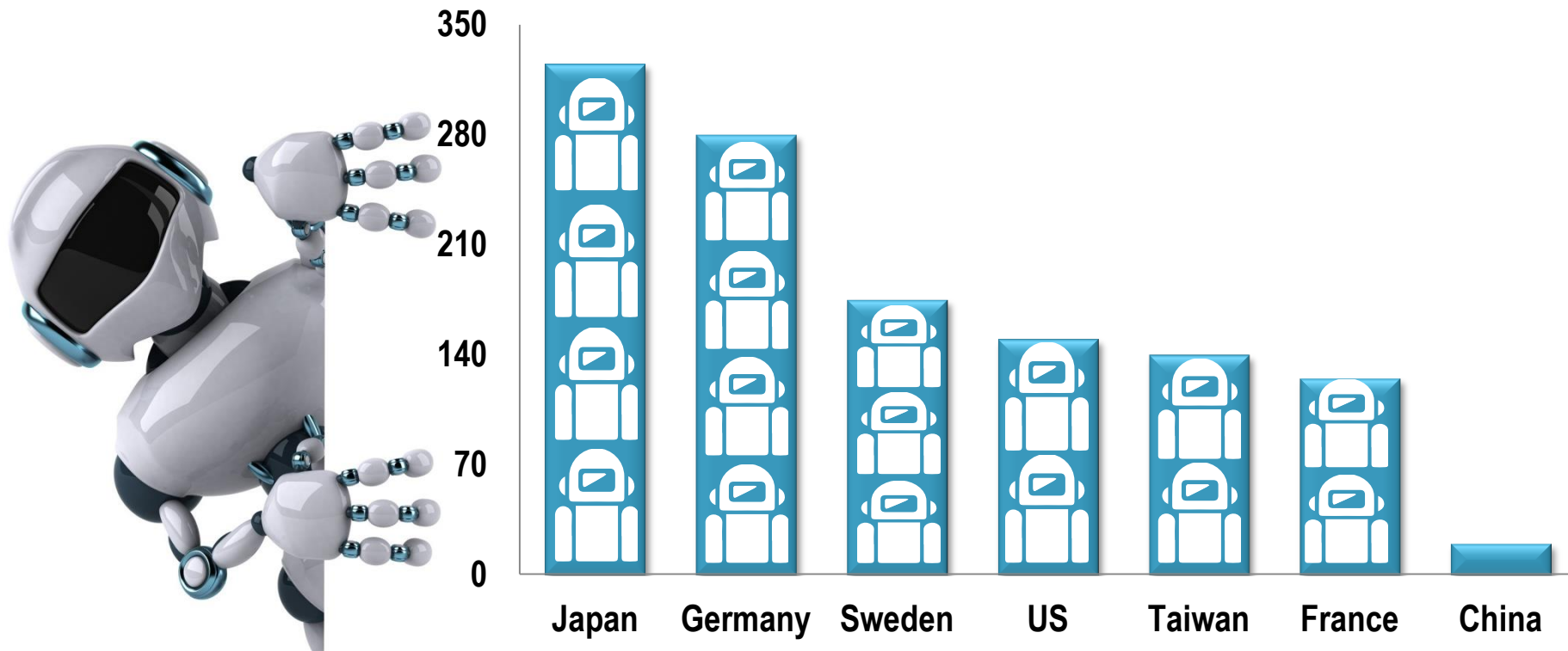


An Automated Robotic Future?



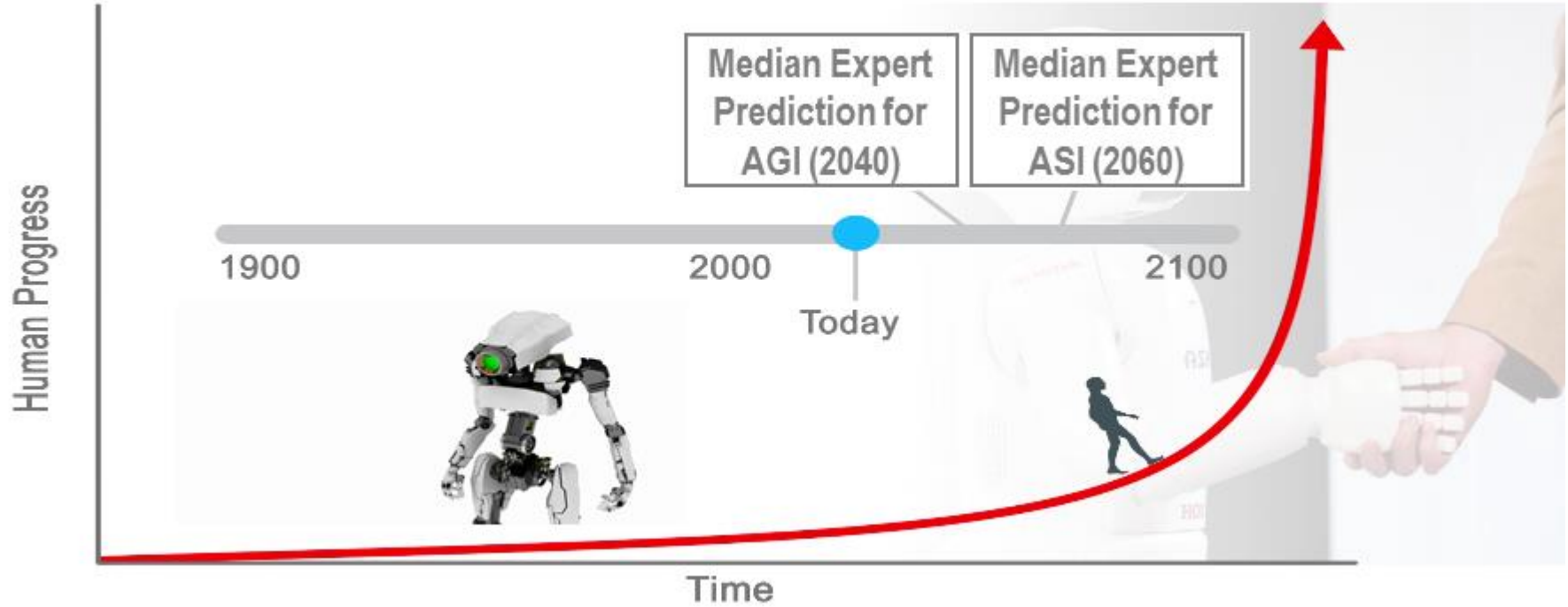
Robotic Densities

Total Robot Density (per 10,000 workers) in 2013



The Urban 'Singularity'?

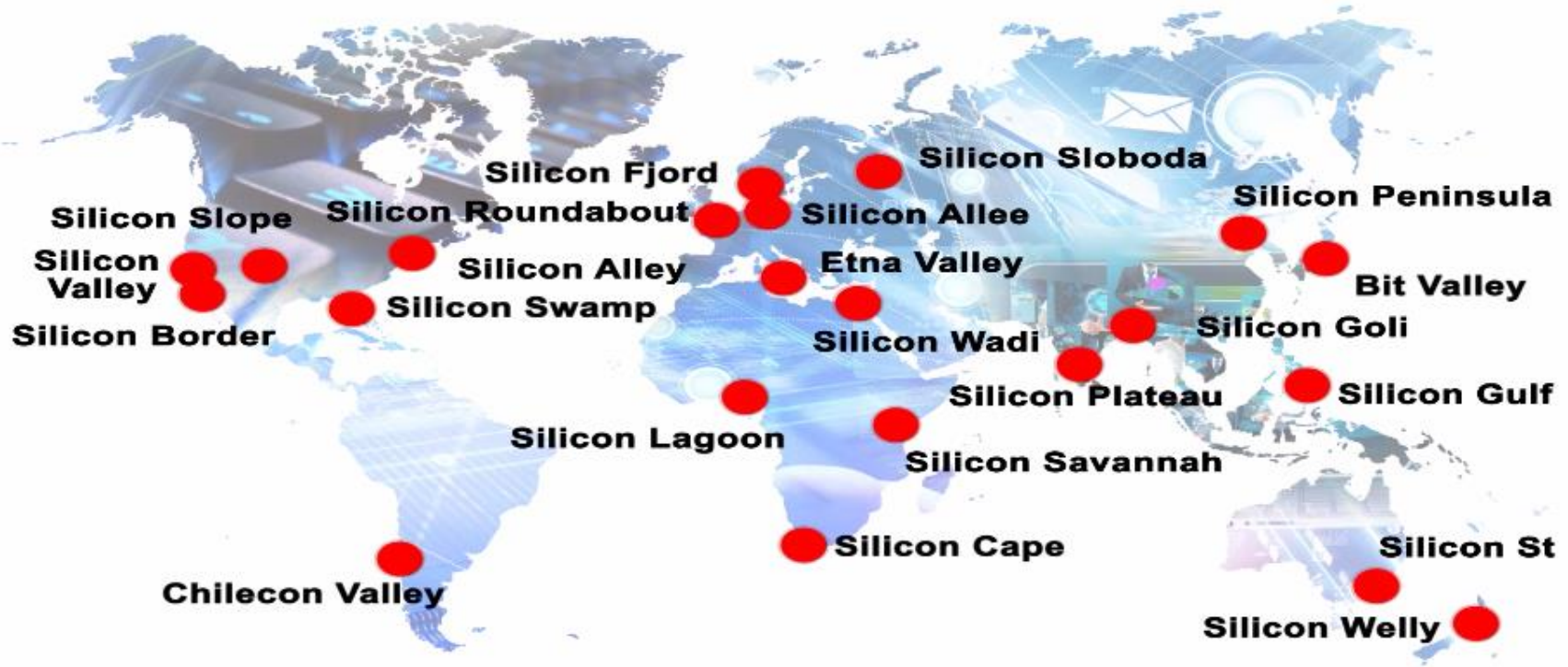
"AI's will dematerialize, demonetize and democratize all services, dramatically improving the quality of life for eight billion people." - Peter Diamandis



The GAFA Economy....and the Game of Thrones



A New Silicon Geography



New World Cities : The Death of the Old City Hierarchy





Urbanisation – The Ultimate Challenge



People and Cities



**Allow Cities
to Sprawl**



**Densify
Existing Cities**



**Build
New Cities**

Density Myths and Memories – A Western Perspective?

“Density is always about crowding **poor people** together.”

“High density buildings attract **crime**.”

“Cities that become more dense **lose individuality**.”

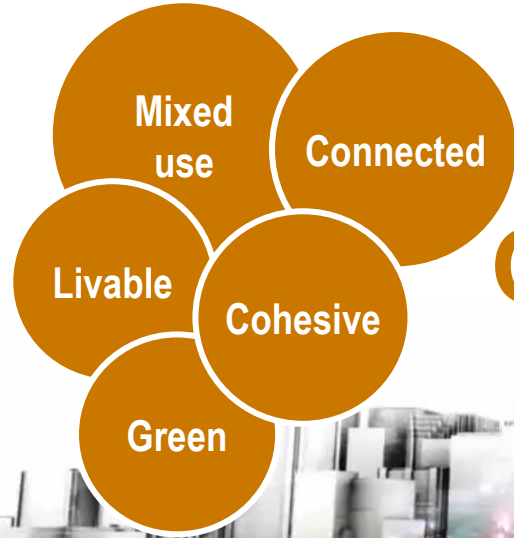
“**People don’t want** to live in high density buildings.”

“Density always involves **loss of privacy**.”

“High density means **high rise**.”



Building for Density



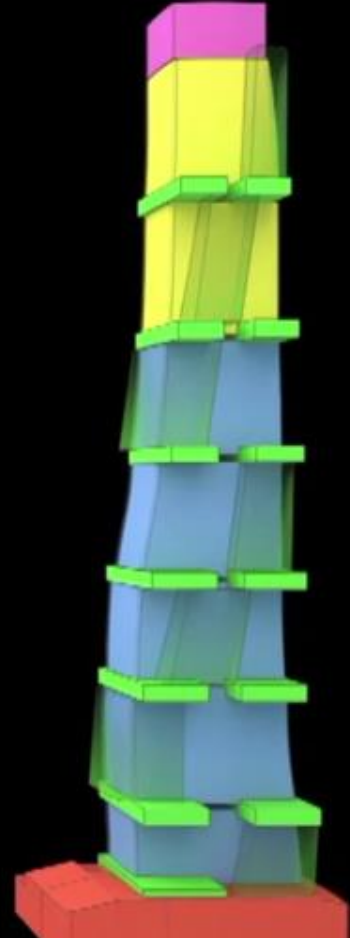
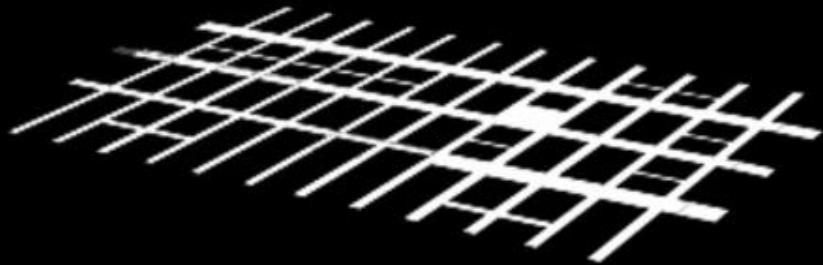
Good **Bad**

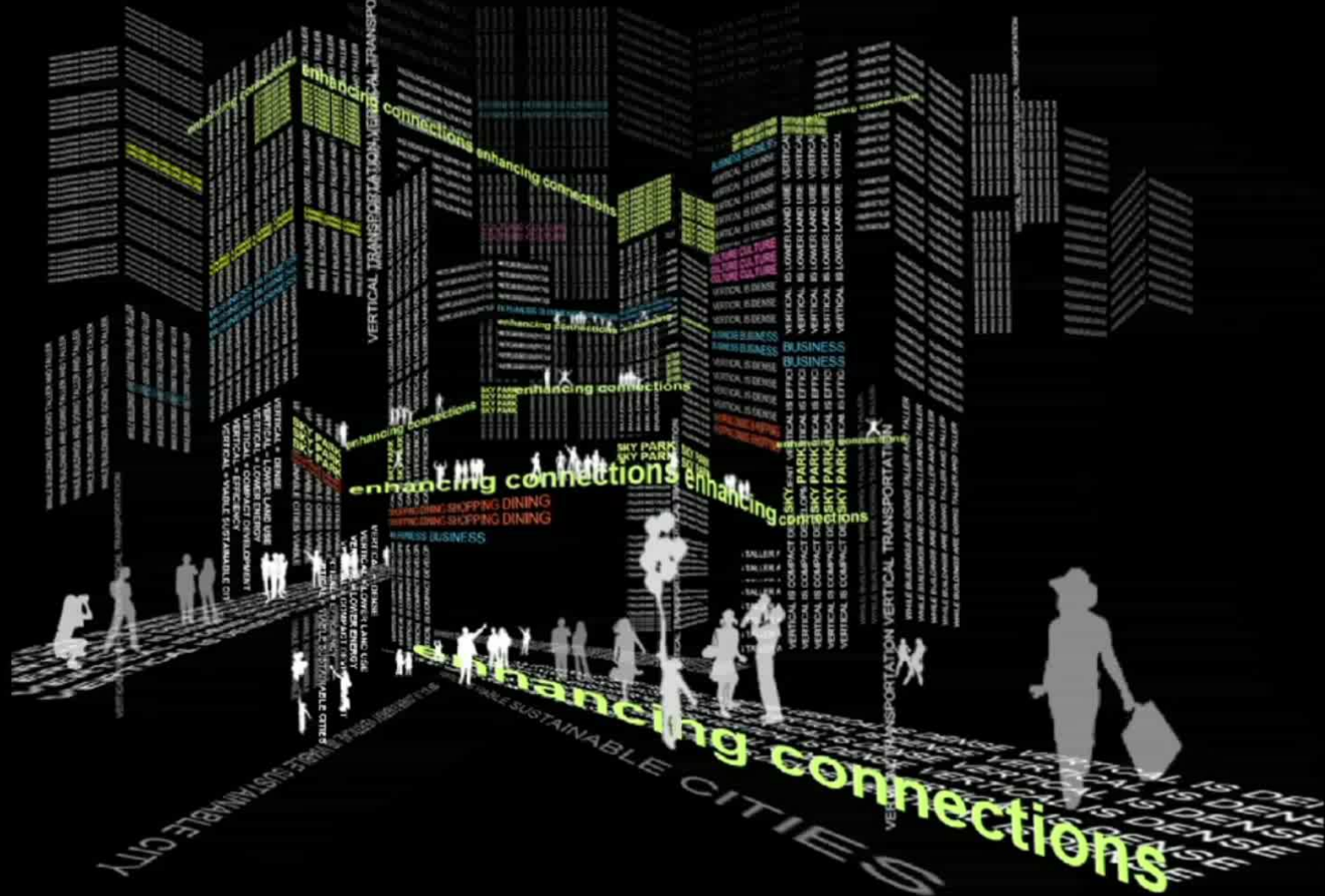


The Densest Borough in London



VERTICAL TRANSFORMATION





The JLL City Momentum Index

Absorb, Create, Respond, Anticipate

Economy

Connectivity

Corporate Activity

Construction

Property Prices

Real Estate Investment

Technology

Environment

Education

- 1 London
- 2 Silicon Valley
- 3 Dublin
- 4 Bangalore
- 5 Boston
- 6 Shanghai
- 7 New York
- 8 Sydney
- 9 Beijing
- 10 San Francisco
- 11 Nairobi
- 12 Shenzhen
- 13 Seattle
- 14 Tokyo
- 15 Nanjing
- 16 Austin
- 17 Hyderabad
- 18 Melbourne
- 19 Seoul
- 20 Auckland



Business and City Partnerships: Key to Future Cities

Collaboration in
Development of
New Cities

Songdo & Cisco
Tianjin Eco-City &
Panasonic, GM, Philips

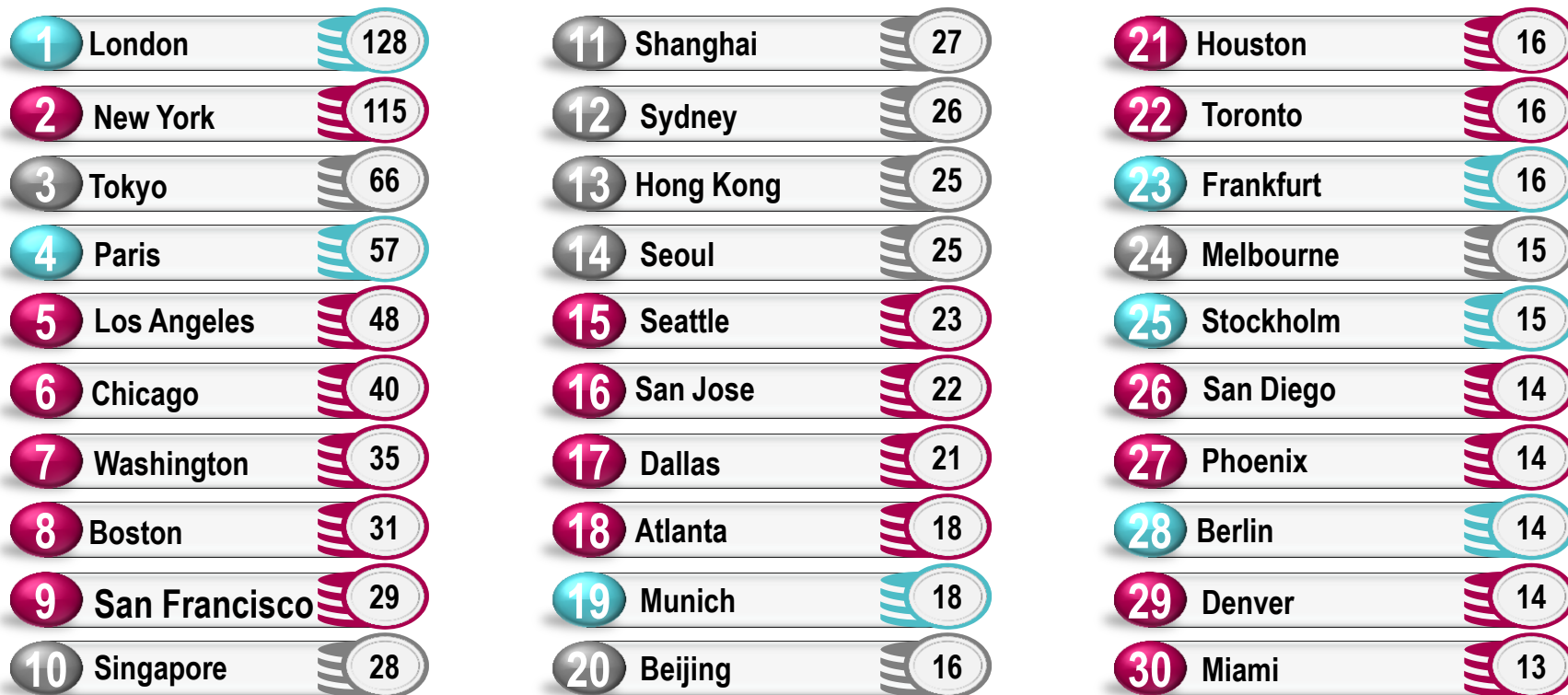
Joining Forces
to Enhance
Exports & Foreign
Investment

Portland's Metro Export
Initiative, companies
collaborate on "We Build
Green cities" campaign

Financial Support
for City
Development

Philanthropic IBM
Smarter Cities'
Siemens - Thameslink;
J P Morgan - new Detroit
M1 rail line

Top 30 Cities take 50% of Capital Flows Q4 2012 – Q3 2015, US\$ bn



The Battle for \$1 Trillion of Real Estate Investment





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