

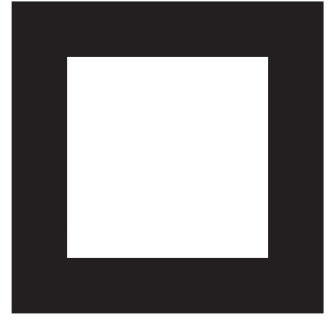
PERSPECTIVE

NEWSLETTER OF PERSPECTIVE

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A PERSPECTIVE ON DEVELOPMENT OPPORTUNITIES IN AFRICA

DEXTER MOREN PROVIDES AN INSIGHT INTO
ECONOMIC FACTORS, GROWTH REGIONS AND
DEVELOPMENT OPPORTUNITIES IN AFRICA



PORTUGAL 25 DE SETEMBRO
OFFICE BUILDING, MAPUTO
MOÇAMBIQUE



IRELAND DUBLIN AIRPORT
AUTHORITY OFFICE
REFURBISHMENT



SWEDEN TELEGRAFBERGET:
A GEM IN A SETTING OF
NATURE



NETHERLANDS THINKING IN
SCENARIOS



BELGIUM WORK IN RWANDA



UNITED KINGDOM
NEW FOOD & BEVERAGE
CONCEPT FOR HOTEL INDIGO
KENSINGTON



UNITED KINGDOM
PERSPECTIVE LONDON
MAKES THE AJ120 LIST

A PERSPECTIVE ON DEVELOPMENT OPPORTUNITIES IN AFRICA

Dexter Moren, director of PERSPECTIVE London shares his thoughts on development opportunities in Africa.

With vast improvements in infrastructure, a prospering mobile industry and rapid economic growth Africa is rapidly emerging as a target market for international developers and investors.

“The recent Africa Hotel Investment Forum in Ethiopia was well attended by a wide range of individuals and companies interested in the African Hotel market. Significant was the attendance by all the major global brands as well as emerging local brands and those from Asia.

While Marriott have stolen a march from the rest through its acquisition of RSA based Protea, Carlson Rezidor seem to be most active, closely followed by Hilton, both having set up significant bases in Cape Town. Accor & Starwood are similarly seeking growth in Africa from RSA bases while IHG are leading from Dubai.

Why Africa? Essentially it's a matter of growth, both of population & economy, and Africa is viewed by most as the next Asia or China.

While the IMF predicts world GDP annual growth outlook for the Eurozone at 0.12% and China at 0.83% the rest of the world is predicted at 1.36% and much of this from Africa where Angola, Ghana, Kenya, Nigeria, Tanzania, Ivory Coast, DRC & Ethiopia are all predicted to experience actual growth rates of between 4% to 9.7%. By 2025 Nigeria



is predicted to be a \$1 Trillion economy, Africa's largest.

There are reported to be more than twice as many middle-class citizens in sub-Saharan Africa than there were 30 years ago and the predicted growth curve remains steep while the economist predicts that 7 of the world's 10 fastest growing economies in the period 2011 to 2015 are in Africa (Ethiopia, Mozambique, Tanzania, Congo, Ghana, Zambia & Nigeria).

This all translates simply into a demand for development that potentially outstrips the future of other international markets.

There are of course limitations. Africa comprises 54 countries and while Nigeria soars ahead countries like Zimbabwe & Congo have declined. It is not one market such as Europe, there remains much security and political instability plus the growing threat of Ebola. Added to this is the lack of comprehensive air linkages that are commonplace in Europe though the latter might fuel more rather than less hotel demand, plus the factor of difficulty of doing business.

Asking the world's leading brands for their ambitions for Africa elicits some fairly consistent & predictable results. Despite its already relatively sophisticated market South Africa remains, with Nigeria, top of the list. This is followed

by Kenya, Tanzania, Ghana, Ethiopia, Uganda Mozambique & Angola with Rwanda a popular choice by virtue of the fact that it is uniquely the easiest place to do business.

Generally the mid-market model is seen as the principal market. Brands are now also looking beyond signature representation in each country's leading city and are coming head to head with local regional brands who have secured such strongholds.

Africa's future may largely be dependent on its ability to grow beyond traditionally heavily resource based economies, to the production of goods presently largely exported in unprocessed state.”

(Above main image: Sunrise Hills Abuja, Nigeria. Inset image: Tsogo Sun Hotel, Cape Town RSA)



NETHERLANDS THINKING IN SCENARIOS



Lately PERSPECTIVE Alkmaar worked on a masterplan for the Wilhelmina Hospital in Assen, NL. This middle-sized (35,000 m²) Dutch Hospital is being exposed to a rapidly changing health environment. The hospital facility has not been changed very much since it was built in the 90's. Perspective Alkmaar has been asked to support the hospital in finding its

new direction for the future and to show them the consequences in for the hospital building.

Being convinced of the fact that there is not just one conceivable future Perspective Alkmaar developed a definition and a masterplan for the hospital in 4 scenarios. The scenarios were worked out into

functional schemes, investment costs and phasing schedules. Where the first scenario showed the situation when just demanded quality changes would be made (less investments cost) the other 3 scenarios focussed on an optimal functional scheme, on time priorities and the last on an optimal mix of all. Based on those differences the

management has chosen to work out 2 of the 4 scenarios to be compared more closely (including impact on exploitation cost). The whole scenario study gives a good insight in the advantages of the investments and confidence in dealing with the risks of the unknown future.



IRELAND DUBLIN AIRPORT AUTHORITY OFFICE REFURBISHMENT

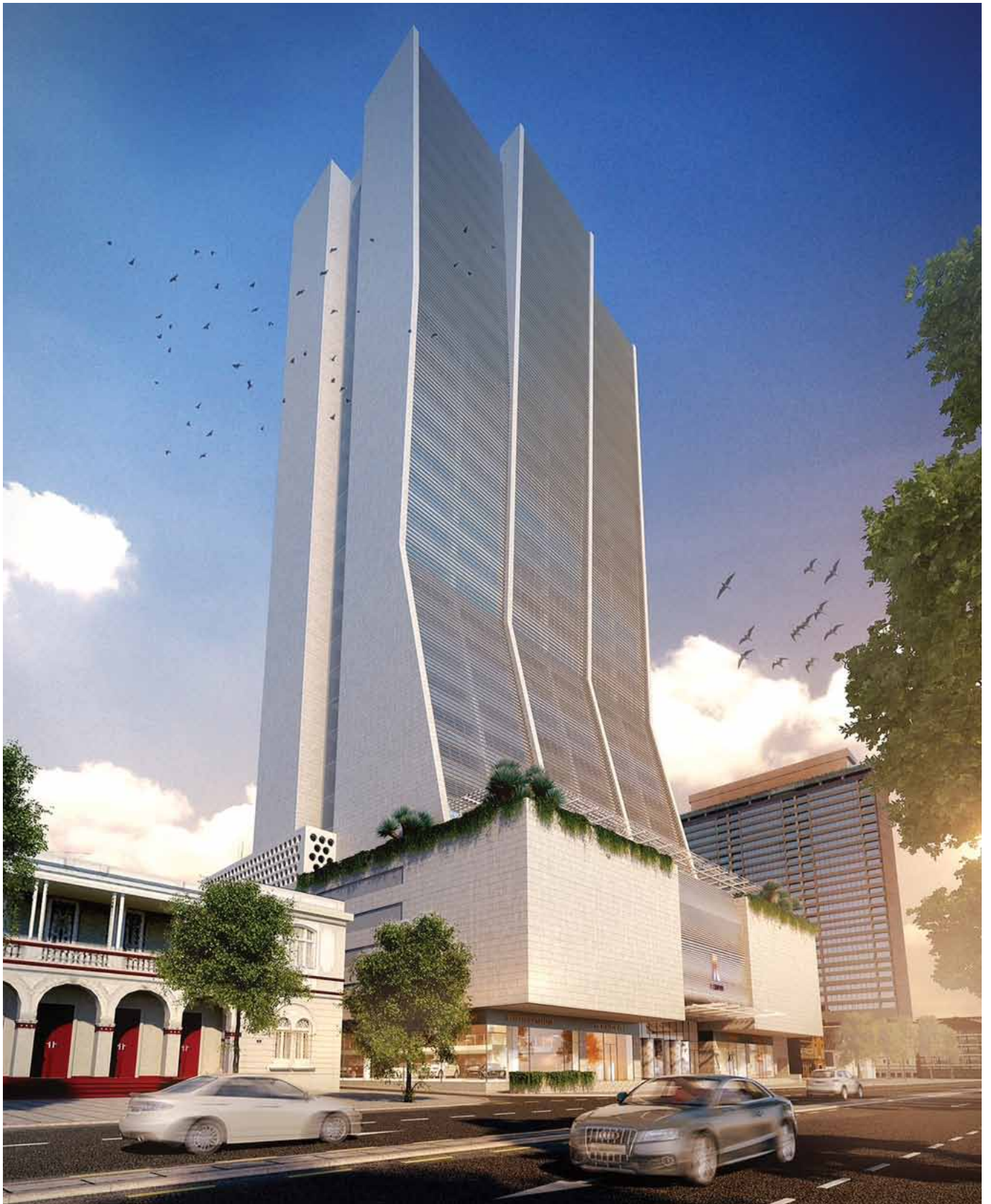
Renovation and refurbishment of 1960-70's office buildings is now a key focus of international investment in Ireland. This project at Dublin Airport, by PERSPECTIVE Dublin for the refurbishment of an 8200 sq. m six storey building is one such project.

This is a Design-Build Competition which includes the provision of high quality, flexible, Grade A office accommodation and refurbishment of the external envelope and services design to achieve a LEED Gold accreditation and an A3 Building Energy Rating. It is required to bring

it to the market quickly and facilitate phased handover for early tenant occupation.

We have adopted a Building Information Modelling (BIM) process in preparation of the tender proposal. This process has allowed us to comprehensively consider and test solutions, and make informed decisions. This has provided us with greater cost and programme certainty in developing our approach to the project. Our 'smooth handover', BIM to FM, manages phased handover for tenant fitout and occupation.





**PORTUGAL 25
DE SETEMBRO
OFFICE
BUILDING,
MAPUTO
MOÇAMBIQUE**

PERSPECTIVE Lisbon and its partners in Mozambique have designed an outstanding corporate building in Maputo's Downtown Business Centre.

Located in Avenida 25 de Setembro, this 31-storey, 126m high landmark overlooking the downtown area and the sea will exceed 50,000m² in construction, with offices, retail, restaurants, complementary services and 570 parking places.

The building displays a rich architectural language, resulting from a balanced relationship between form, space and function. Topping a 22m tall podium comprising parking, retail and restaurants, the office tower rises as three vertical blades with different facade planes and tilt angles. Horizontal shading devices contribute to a balanced architectural object.

The use of a highly efficient modular interior concept and sustainable design throughout are two key elements calling for solutions and techniques along the design development, the construction process and the building's operating life, where the spatial-functional, environmental, social and economical dimensions will harmoniously be balanced.



SWEDEN TELEGRAFBERGET - A GEM IN A SETTING OF NATURE



Telegrafberget - the Telegraph hill - is situated along the northern coast of Nacka next to the sea-approach to Stockholm - a reclaimed industrial site surrounded by otherwise protected nature with a dramatic topography and stunning views.

The steep north facing cliff is to be developed into an attractive housing area. Working with land owners, developers and municipality, PERSPECTIVE Stockholm has produced a detailed development plan, preliminary project design and an environmental impact plan that fit the dramatic topography.

90 apartments by the water, 50 apartments and 40 terraced houses with elevated sea-view and 40 terraced houses and 70 apartments in the forested valley. Small-scale offices, some commercial areas and boating-related facilities contribute to the dynamic life.

The development has a minimum of environmental impact. The design aims for an energy consumption of less than 40 kWh/m² per annum and 0 CO² emissions.



BELGIUM WORK IN RWANDA

The Belgian religious order of the Brothers of Charity is active in close to 30 countries all over the world. One of these countries is Rwanda where the Brothers have been present since the early 20th century.

As a result of this long standing presence the Brothers currently occupy several important sites in Rwanda where they focus on their core work, namely the education and care of the mentally vulnerable.

One of these sites is located in Butare, the former capital of Rwanda, also named Huye and the principal university town of the country.

The Butare site covers some 50 hectares and consists of older school buildings, a convent, an old hospital and dwellings for the teachers. It is located on the fringe of Butare, amidst a number of imposing colonial buildings and on a green sloping site.

The brief to PERSPECTIVE Antwerp was straightforward. Namely, develop a masterplan for the redevelopment of the site in such a way that a maximum of value can be created for the construction of new contemporary buildings.

Perspective Antwerp's proposal was to commercialize half of the site for

housing, thus generating funds that can be used to redevelop the other half for the Brothers.

In order to do so, a new allotment plan with numerous housing plots was proposed.

For the other half, the existing 1930's Art Deco school and convent will be renovated and combined with new school and hospital buildings. Also, new apartment buildings for the teachers will be built.

These masterplan proposals had to be combined with the overall Butare masterplan which includes the

creation of new artificial lakes, one of them partly on the property of the Brothers.

Currently, the masterplan is being consolidated and the project is now entering the stage of detailed design. For this, Perspective Antwerp will team up with a local architectural partner.

Perspective Antwerp is proud to add to the Brother's rich heritage worldwide. Also, this project offers Perspective Antwerp valuable experience in the design and construction of large scale projects in Africa.

UNITED KINGDOM NEW FOOD & BEVERAGE CONCEPT FOR HOTEL INDIGO KENSINGTON



Hotel Indigo is a lifestyle brand that seeks to reflect the tastes and cultures of the communities in which their hotels are located. With a new food & beverage concept and hotel lobby designed by PERSPECTIVE London, Hotel Indigo Kensington hopes to unite guests & locals alike in a celebration of its neighbourhood story.

Working closely with IHG on behalf of owner The Cairn Group, Perspective London have completed a comprehensive refurbishment to the ground floor public areas. The interior design team were set the challenge of designing a space that would become a local landmark. The brief was about re-invigorating the site to become a proactive and integral part of the neighbourhood; creating a 'local living room' (the hotel reception) and a local deli (the food and beverage offer).

A key aspect of Perspective London's approach was the creation of separate entrances for the hotel and café to help attract locals and create an authentic community feel. The space



also includes a snug area which can be partitioned off with beautiful fluted glass screens and booked for private events and meetings.

Design elements include checkerboard flooring - a reference to the traditional deli aesthetic, and a play on detail in single elevations - banquettes with quilted leather, tongue and groove

vertical paneling with chevron timber panels above. Glass prismatic lights and industrial style pendants can be adjusted to create ambient settings. The 'neighbourhood story' lies at the core of the concept in the hotel lobby and draws inspiration from the nearby performance venues of Earl's Court.

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UNITED KINGDOM PERSPECTIVE LONDON MAKES THE AJ120 LIST



We are pleased to announce that PERSPECTIVE London have made it into the 2015 AJ120 list of UK top architecture practices. The AJ120 survey has been the definitive record of the UK's most esteemed architecture practices for the past 20 years and

recognises and rewards achievements made by these firms each year.

Published annually since 1995, the survey showcases a snapshot of the architecture profession over the previous calendar year covering key AJ120 survey data including fees, salaries, sectors and markets as well as indicating levels of employee satisfaction, design quality and business growth.



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