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1. Belval – Fact Sheet - Location

[Map showing Belval's location with marked points for Sanem, Esch-sur-Alzette, and the Motorway to Luxembourg Airport, with distances indicated.]
Changing old industrial structures to urban modern districts – That’s the core mission of Agora!
1. Belval – Fact Sheet - 2018
1. Belval – Fact Sheet – Districts map
1. Belval – Fact sheet

- Located at Esch-sur-Alzette and Sanem in the southern region
- 120 ha total surface due to Masterplan 2002
- 1.350.000 m² gfa: 600.000 m² public and 750.000 m² private; building legislation since 2003
- 300.000 m² gfa office, 350.000 m2 housing, 100.000 m² gfa shopping / leisure / hotel / service facilities in private development
- 1.000.000 m² gfa sold
- 625.000 m² finished or under construction = 46 % of overall program
1. Belval – Fact sheet

- More than 8,000 inhabitants, about 2,400 already on site including students and CIPA
- Up to 25,000 working places, 5,000 already on site every day
- 5,300 students, pupils and searchers on site
- More than 180 companies, shops and administrations on the site
- Direct motorway access, 25 minutes to the airport
- Existing direct train link from the greater region, station Belval-Université on site, pedestrian distances within area
- Efficient buses connections to Luxembourg, Esch and Metz
- Today, largest area with sustainable certificate by DGNB
2. Belval – Mobility – Site map

- Main accesses
- Roads
- Access to park (pedestrian & bicycle)
- Bus stops
- Tunnel Micheville
- Completed buildings
- Buildings under construction
- Building areas

- Line Luxembourg - Belval Université Station - Rodange every 15 minutes
- 10 City Bus lines
- 5 Crossboarding lines
- 4 Rental bike stations in Belval

- PARK & RIDE at Belval Université Train Station with 1,622 seats
2. Belval – Mobility - Car

Workers repartition. Tot: 406,000

- 45% Luxembourg ha.
- 55% Commuters

Source: Statec

Morning car travel time

Source: Google maps

Morning time waste

Source: Google maps
2. Belval – Mobility - Car

Commuters repartition. Tot: 184,000

- 52% from France
- 24% from Belgium
- 24% from Germany

Evening car travel time

Evening time waste

Source: Statec, Google maps
2. Belval – Mobility - Train

- Direct trains to Luxembourg every 15 minutes (30 min travel time)
- Direct trains from Luxembourg every 15 minutes (30 min travel time)
- Connexions from Luxembourg station to Belgium, France and Germany
- P&R 1.600 spaces
2. Belval – Mobility - Bus

Accessibility in Belval through the following lines:

- TICE Line 1: Esch - Belvaux - Lamadeleine
- TICE Line 2: Esch - Soleuvre - Differdange
- TICE Line 3: Esch - Belvaux - Bascharage - Rodange
- TICE Line 4: Belval - Esch - Schifflange - Dudelange
- TICE Line 7: Belval - Esch - Lallange
- TICE Line 15: Esch - Belval - Bascharage - Clemency
- RGTR Line 202: Luxembourg - Belvaux - Obercorn
- RGTR Line 203: Luxembourg - Soleuvre - Differdange
- RGTR Line 332: Steinfort – Belval
- RGTR Line 750: Niedercorn - Steinsel

5 additional crossboarding lines:

- RGTR Line 306: Trier (D) - Cloche d'Or - Belval
- RGTR Line 309: Perl (D) - Frisange – Belval
- RGTR Line 321: Luxembourg – Esch – Villerupt (F)
- RGTR Line 322: Esch - Rédange (F)
- Line Metz (F) – Belval (+/- 55 min travel time)
2. Belval – Mobility - BHNS

The BHNS is « High level services buses ». There will be two new lines during the following years.

- East – West: will connect Dudelange to Differdange (and maybe Rodange in the future)
- North–South: will connect Luxembourg city to Micheville in France

Those two lines will have a stop in square mile in Belval.

An other stop with an exchange possibility between those lines and the other traditionnal bus lines will be possible just at the entrance of Belval site (Raemerich).

BHNS advantages:
- Higher frequency: 1 bus every 8 minutes
- Higher capacity of the vehicles with more seats
- Higher speed due du dedicated lanes in critical points
2. Belval – Mobility – Bike / Pedestrian
Office stock evolution in Luxembourg.

Source: Inowai Research
3. Office market - Luxembourg

Stock per district.

Belval is the biggest periphery district (5% total market share)

Source: JLL Research
3. Office market - Luxembourg

**Take-up evolution in Luxembourg.**

- Take-up p.a.: 178,000 m² 10 years average
- Take up 2017: 210,500 m²
- Vacancy: 4 - 7 % during last years, large spread within different areas
- Vacancy Q4 2017: 4.8%

**Vacancy rate evolution in Luxembourg.**

Source: JLL Research, CBRE Research, Q4 2017
3. Office market - Luxembourg

Prime rents evolution.

- Prime Yield: 4.5%
- Invest volume average: +/- 800 Mio € during last 10 years
- Invest volume 2017: 1.2 Bn €

Source: JLL Research
4. Office market - Belval

Office stock at Q1 2018.

1. Bil 1                                37.100 m²
2. Bil 2                                22.000 m²
3. Alho / GKE                          300 m²
4. Belval Bridge Building         450 m²
5. Adem                                9.100 m²
6. Bio - K                              10.355 m²
7. Southlane 1                       3.800 m²
8. Agora                               1.470 m²
9. Southlane 3                       2.000 m²
10. Résidence du Jazz           2.900 m²
11. Feierwon                           800 m²
12. Feiersteppler                    2.120 m²
13. Galileo                             670 m²

Total private office              93.065 m²
Total public office                 116.800 m²
Total Office Stock              209.865 m²
Office stock evolution in Belval.

16% of market share since 2006

Source: Agora, Q 4 2017
4. Office market - Belval

Take up and vacancy rate.

**Take Up:**

Take up 2017:
- Office: 4,700 m²
- Retail: 3,800 m²

Number of transactions:
- Office: 13
- Retail: 14

Pre-letting 2017:
- Office: 10,600 m²
- Retail: 1,800 m²

**Vacancy:**

Vacancy Q1 2018:
- Office: 17,280 m²
- Office rate: 8.2 %

Vacancy rate increase from 3.9 % to 8.2 % due to the lease renegotiation from the biggest private tenant.
4. Office market - Belval


2018:
1. Maison du Livre 3,832 m²
2. Maison des Matériaux 34,854 m²
3. Naos 13,000 m²
4. Rouden Eck 3,600 m²
5. Capelli Towers 2,196 m²
6. Southlane 2 4,600 m²

Total private pipeline 23,396 m²
Total public pipeline 38,686 m²
Total pipeline 2018 & 2019 62,082 m²
5. Housing market - Luxembourg

Residential deliveries in Luxembourg per year.

![Graph showing residential deliveries from 1990 to 2015.]

- Average 10yrs: 2.893

Structure of households in Luxembourg

![Pie chart showing household structure.]

- 1 pers: 29%
- 2 pers: 17%
- 3 pers: 17%
- 4 pers: 16%
- 5 pers: 6%
- 6 pers: 2%
- 7 pers & +: 1%

Source: Statec

Population south region.

![Graph showing population growth from 2003 to 2023.]

South region:
- 167,000 hab.
- 28% of total pop.
5. Housing market – Luxembourg

Prices for new apartments (VEFA)

- Average price 2017:
  - Sanem: 5.735 €/m²
  - Esch: 5.498 €/m²
  - Country average: 6.305 €/m²

Evolution of national sale price

Source: Liser
5. Housing market - Luxembourg

Evolution of price level to rent

- Rental level for apartments:
  - Country average 19.91 €/m²
  - Esch: 17.98 €/m²
  - Sanem: 16.98 €/m²

- Rental level for houses:
  - Country average: 14.11 €/m²
  - Esch: 12.65 €/m²
  - Sanem: 12.67 €/m²

Source: Observatoire de l'Habitat
6. Housing market - Belval

- Total offer about 350,000 m² gfa (not included public developments as student homes), → 2,957 units plus 1,000 rooms/beds in special projects (private student homes, houses for elderly people,...)
- **931** units are completed (32 %) => +/- 93,000 m² gfa
- Average price of latest apartment transactions: **5.159 €/m²**

Source: Agora
6. Housing market - Belval

Residential stock in Belval.

1.764 accommodations already built:
- 931 flats
- 165 senior rooms
- 668 student rooms

Ground school
Under construction

High school 1.500 students
6. Housing market - Belval

Future areas Belval-South (BS) | Square Mile (SQM): Split of apartments by size (forecast).

Belval South - forecast per type in accommodations units (Total = 584)

Belval South - forecast per type in m² BGF (Total = 69,602)

Square Mile - Forecast per type in accommodations units (Total = 1,290)

Square Mile - Forecast per type in m² BGF (Total = 127,364)
7. Retail & Services - major retails

**BelvalPlaza:**
- Total m² shopping: 36,500 m²
- Retails: 35
- Restaurants/bars: 12
- Leisure: 7
- Parking spaces: 853

**Other:**
- Retails: 8
- Restaurants/ bars: 9

**Hotel:** 1
- Rooms: 110
- Parking spaces: 133
7. Retail & Services - major retail brands

- Terrasse Hauts-Fournaux: 50,000 m² gfa shopping, restaurants, cinema
- Potential space in Square Mile: 50,000 m² gfa
7. Retail & Services – restaurants & bars
7. Retail & Services - Services

More than 60 retails actually on Belval site
7. Retail & Services - Leisure

- **Rockhal**
  - 1 room 5.400 people
  - 1 room 800 people

- **Ciné Belval**
  - 7 rooms

- **Belval Parc**
  - 8 ha
8. Belval – Public areas

1. Place de l'Université
2. Place de l'Académie
3. Place des Archives
4. Hauts-Fourneaux
5. Parc Belval
6. Plateau Saint Esprit
7. Place CIPA
9. Research - Innovation Campus
9. Research - Innovation Campus

1. Maison du Savoir
2. Maison du Nombre
3. Maison des sciences humaines
4. Maison des matériaux
5. Maison des Arts & des étudiants
6. Maison du Livre

1. LIST
2. Start Up Center
3. Biotech
4. Maison de l’innovation
5. Biotech II
9. Research - Innovation Campus

Existing buildings under activity.

**Maison du Savoir**: The « Maison du Savoir » is the central building of the University of Luxemburg and the « Cité des Sciences ». It houses the central administration, amphitheatres as well as general teaching infrastructures of the University of Luxemburg. There are also rooms that can be used for public or private seminars.

**Maison des Sciences Humaines**: The "Maison des Sciences Humaines" hosts researchers and students of the faculty of arts, social-sciences, languages and Education. It houses also the Social Research Institute (LISER).

**Maison du Nombre**: The «Maison du Nombre" is provided for mathematics and IT. The buildings accommodate specific research and teaching activities. The university’s computer center is also located in-there.

**Maison des Arts et des Étudiants**: The "Maison des Arts et des Étudiants" accommodates various social, cultural and artistic events such as concerts, exhibitions or receptions. It also houses student associations.

**Maison de l’Innovation**: Among other things, this building houses partly the activities on the part of the Center for Science and Technology Research (LIST).

**House of Biomedicine**: This building houses the Luxembourg Center for Systems of Biomedicine (LCSB), an interdisciplinary center for research in biotechnology. The building consists mainly of laboratories with integrated office spaces.

**Halls d’Essais des Ingénieurs**: This hall hosts test laboratories regarding materials studies.

**Technoport**: It is a business incubator working mostly very closely with the various faculties of the University of Luxemburg.
9. Research - Innovation Campus

Buildings under construction:

Maison du Livre: It is the library of the University which has moved in one of the main vestiges of the iron and steel industry. The "Maison du Livre" will be open to all students and University’s staff, searchers but also to all citizens.

Maisons des Matériaux I & II: These buildings will be dedicated to the domain of material research as well as the engineers’ test halls.

Upcoming Buildings:

• Maison des ingénieurs
• Maison de l’environnement
• Maison de la vie
10. Outlook – Plots of land sales

1.000.000 m² gfa sold !
11. Central Square - Outlook

- Most representative district of Belval
- Located in the heart of the site
- District including a wide pedestrian zone
- Mixed uses: office, retail and residential
- Total building possibility: 187,000 m²
- Total of 13 Plots of lands
- District providing a great flexibility with buildings between 2,000 et 17,000 m²
- 3 Plots already sold under architect contest
- 5 Plots under decision
- Architectural contest for the public square in process

Central Square: where Belval’s heart beats
Independent building size starting at 2.000 m²

Mixity is an added-value

Architectural global concept with several heights and internal gardens.
11. Central Square – What’s up

Architectural contest in progress
11. Central Square – What’s up

Developer selection in progress
12. Belval South - Outlook

- Future residential district including services
- New ground school provided
- Around 550 family housing foreseen
- Total building possibility: 95,000 m²
- 71% for housing
- Residential in a green landscape
- PAP foreseen in 2018

Belval South: Family first
13. Pictorama - Public Constructions
13. Pictorama - Private Constructions
13. Pictorama - Private projects
13. Pictorama - Public Spaces
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