



**Urban Land
Institute**

Philippines

Technical Assistance Panel Report

Poblacion Makati City

March 2019



ReFrame

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About ULI

The Urban Land Institute (ULI) is a global, member-driven organization comprising more than 42,000 real estate and urban development professionals dedicated to advancing the Institute's mission of providing leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

ULI's interdisciplinary membership represents all aspects of the industry, including developers, property owners, investors, architects, urban planners, public officials, real estate brokers, appraisers, attorneys, engineers, financiers, and academics. Established in 1936, the Institute has a presence in the Americas, Europe, and Asia Pacific regions. Across the Asia Pacific region, the Institute has over 2,000 members. The regional office is headquartered in Hong Kong, and we have active national councils in Australia, China, Hong Kong, Japan, Philippines, Singapore and South Korea.

About ULI TAP

A Technical Assistance Panel (TAP) brings the expertise of the ULI membership and the real estate community together to collaborate to find solutions for complex land use, development, and redevelopment projects. TAPs are part of the ULI Advisory Services program and are run by local chapters of the organization.

Over intensive working sessions, experts address key questions about a specific development issue or policy barrier within a defined geographic area. Panelists tour the study area, meet with stakeholders, and collaborate to produce an initial report of findings, providing a roadmap for success.

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Poblacion, Makati TAP

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NoKal

T

The Urban Land Institute hosted the Philippines' first Technical Advisory Panel (TAP) on 13 March 2019 tackling the most buzzed about district in Metro Manila today: Poblacion.

This is not only a planning initiative for the sustainable growth of the district, enabling inclusive development, and stakeholder buy-in. This TAP is also designed as a demonstration of emerging technologies that can change the way real estate, transportation, and planning can better meet the evolving needs of urbanization.

The primary goal of this TAP is to provide the local government with a roadmap to harness development in the district so that small and medium enterprises can thrive alongside a heritage community.

The secondary goal is to provide the Young Leaders' Group with baseline information for their innovation competition for Poblacion. Both the TAP findings and competition's shortlisted ideas were presented at the ULI Philippines Conference: The FUTU/RE Summit on 4 April 2019.

Prior to the TAP event, the team carried out preliminary research through one-on-one interviews with a landowner/developer, members of the local business association, the barangay secretary, a cultural officer, and the city planning department. The team also reviewed the Comprehensive Land Use Plan of the city as well as its recent parking ordinance. To understand the public sentiment on the area, the team prepared and released an online survey. Traffic studies using Waze data and mapping of land values were also conducted.

The base mapping pursuits were presented to the panel and stakeholders during the TAP event to inform the succeeding discussions. Attendees were then given time to communicate what they think are the current challenges of Poblacion and how these can be managed. After hearing the stakeholder concerns, the panel retreated to a separate area to process and articulate what the district needs. Those inputs were then transcribed, processed, and are included in this report.

Top right: The team inspects a prototype of the Poblacion traffic dashboard built using Waze reported incidents; Participants listen to a base map presentation during the TAP event in NoKal **Opposite:** An old house on Don Pedro Street, a remnant of the old Poblacion, is flanked by new establishments: restaurants on one side and a hostel on the other.



TAP Process and Assignments

The Poblacion TAP is composed of the following steps:

- Step 1:** Base mapping property value change, traffic impacts, land use, and activities
- Step 2:** Stakeholder input (residents, local government, business owners, patrons) via online survey and one-on-one interviews
- Step 3:** Launch of a "hackathon" to invite the public to craft solutions to some or all the defined challenges
- Step 4:** One-day gathering of experts and champions for roundtable issues articulation and definition of challenges
- Step 5:** Production of the TAP report
- Step 6:** TAP findings presentation and innovation pitch fest at the ULI Philippines Summit
- Step 7:** Online publication of the TAP report and turnover to the local government

A

As the sun sets, signages on houses fronting narrow streets in Makati City streak the golden hour with neon. Bartenders and waitstaff set up, sometimes serving the two to three people that make up the 6pm-crowd. Revelry is prepared for almost every night as people from all corners of Metro Manila troop to Poblacion—or what many call Pobs—for a good time with colleagues and friends.

Makati's first downtown

Poblacion is a 103-hectare barangay on the south bank of the Pasig River. Makati's first settlements, commercial center, and civic district flourished here. Community life surrounded San Pedro de Macati, a 17th century church and oldest one in the city, and the Presidencia, the first municipal hall completed in 1918. The Makati way of life was forged here. Hence, the city has listed Poblacion Heritage Conservation as a priority program in their Comprehensive Land Use Plan 2013-2023.

Post-war development

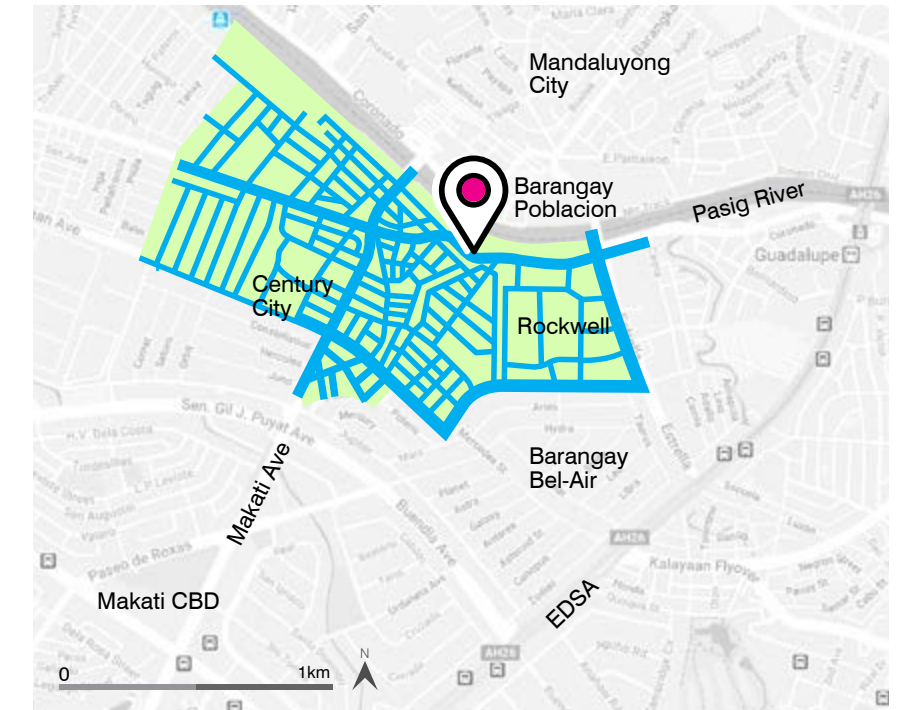
As Ayala Avenue, the main street of the Makati CBD, drew businesses inland in the 1960s, Poblacion's residential character was heightened. Gated villages like San Miguel and the nearby Bel-Air were welcoming their first homebuyers while the old town remained to be the homestead of old families, some of whom the streets are named after.

The blocks to the east of Makati Avenue, the road that threads the CBD to the bridge spanning Pasig River, evolved to become an entertainment strip and red-light district. Despite the commercial flux, Poblacion is still the seat of local government with the administrative complex now at its northwestern corner.

21st century development

Then, two big mixed-used areas were developed: Rockwell Center in the 2000s, a 15-hectare lot on the east edge formerly occupied by a thermal power plant; and Century City in the 2010s, a 4-hectare central lot which used to be the campus of an international school.

The Pobs which is so popular today is bookended by those developments. Modest rent and land values attracted local entrepreneurs to start up here. The rumblings began in 2013 as Pobs became an off-the-beaten path venue for socials. Today, Pobs is immediately associated with the hip milieu of bars and restaurants that keep its streets teeming with people way past midnight as well as the new urban stresses these developments bring.



Below: The first municipal hall of Poblacion, completed in 1918, is now the city museum; Makati CBD as seen from Ayala Ave.
Opposite: San Pedro de Makati Church, inaugurated in 1620, also known as the Saints Peter and Paul Parish Church



Poblacion: Where a City Began

Poblacion Major Roads and Zones Map

- Nokal
- Sokal
- Jokal
- Heritage Zone
- Kalayaan Ave
- JP Rizal Ave
- Makati Ave
- Makati - Mandaluyong Bridge



Pobs: Nightlife Central

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The anatomy of the district

There are three key roads in Poblacion. Running north to south at the center of the site is Makati Avenue, which links the barangay to the CBD and to Mandaluyong City across the Pasig River. Running east to west linking Poblacion to EDSA, Metro Manila's spine, and to the developments across it like Bonifacio Global City (another CBD) are: J.P. Rizal Avenue closer to the river and Kalayaan Avenue by the southern boundary.

The different establishment owners in our study area (see Figure 1) have organized themselves through the Poblacion Commercial Estate Association, which has been registered with the Securities and Exchange Commission. The sub-zones of Pobs have been coined with Kalayaan Avenue as the demarcation: Nokal (north of Kalayaan), Sokal (south of Kalayaan), and Jokal (just outside of Kalayaan).

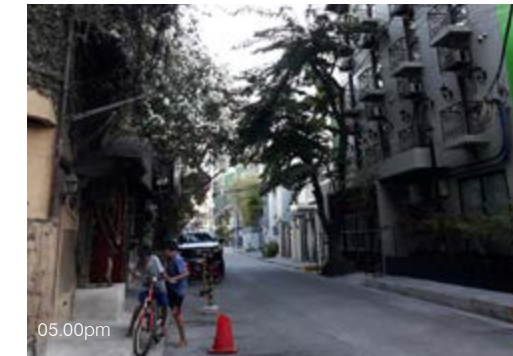
The three sub-zones include the following land uses: Residential, Commercial, Institutional, Heritage Preservation, Planned Unit Development (PUD), and Special Precincts for Urban Redevelopment (SPUR).

Scenes from the street

On 15 February 2019, Friday, we spent 6 hours on Don Pedro Street (marked on map) in Poblacion to observe how street activity shifted from day to night. The street was chosen as a sample for its concentration of new establishments, connection to Kalayaan Avenue, and also because this is a point where residential and commercial land use meet (and sometimes clash).



04.30pm



05.00pm

04.30pm

On Don Pedro Street looking towards Kalayaan Avenue

05.00pm

Looking at Alfonso Street from Don Pedro. The narrow streets are multi-purpose areas for residents. Not only are they playgrounds for kids, these are places for congregation big and small, from annual religious pilgrimages to listening to the latest gossip in front of the sari-sari store.

05.30pm

Traffic starts to build up towards Kalayaan as office hours end. Some people drive through Poblacion to troubleshoot some traffic from Rockwell and on Makati Avenue.



05.30pm

06.00pm

The establishments begin to open. Makati City Ordinance 2018-011 allows right-side parking along this street. However, the capacity is still not enough to serve everyone who visits the district at night. Many opt to park in nearby malls like Power Plant or Century City and opt to walk.



06.00pm



07.00pm



07.15pm

07.00pm

One-side parking begins on Kalayaan Avenue. By 9pm, it's almost impossible to find an empty slot here.

07.15pm

One of the many residences with commercial establishments

09.00pm

Traffic on Makati Avenue as seen from one of the rooftops in the district



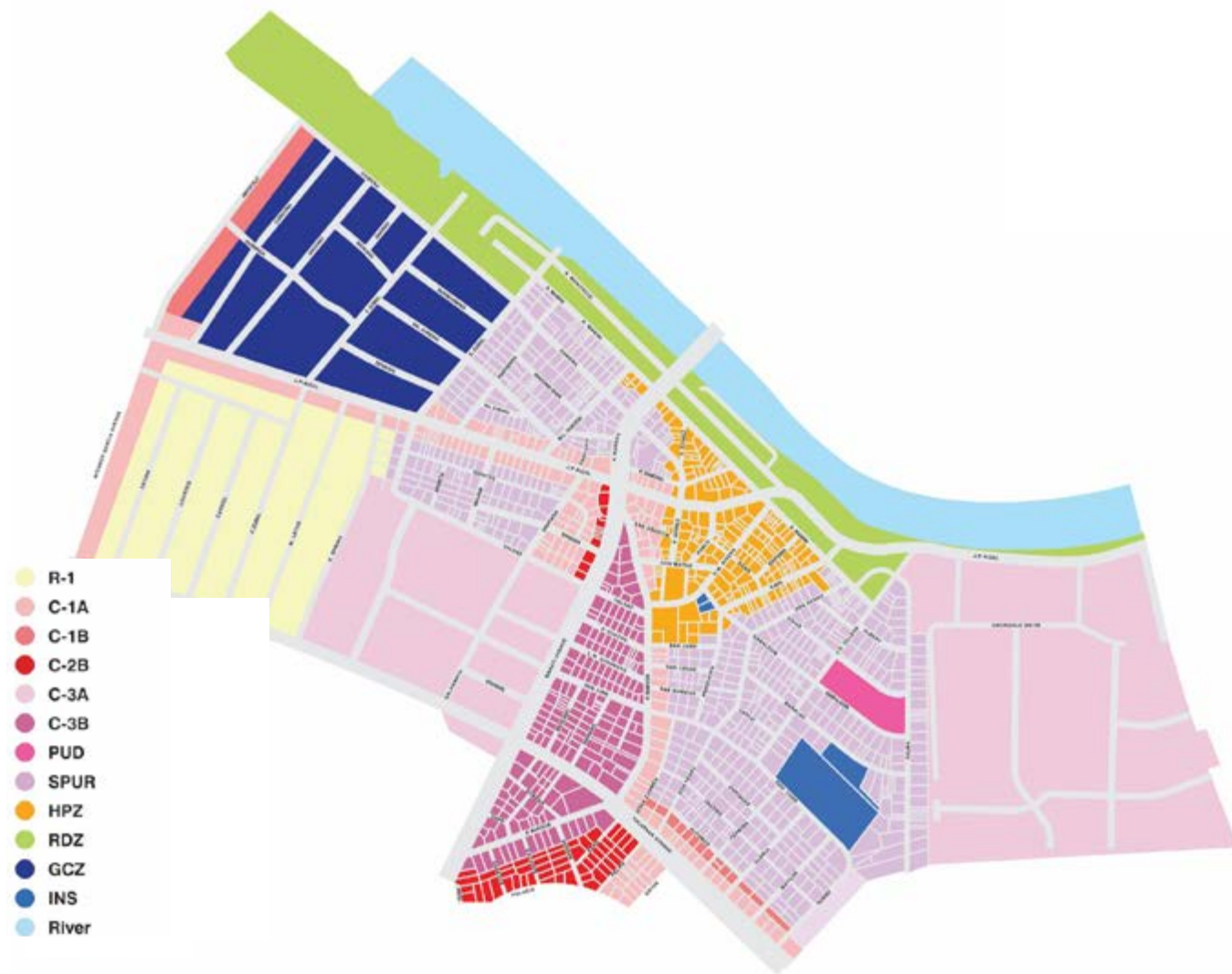
09.00pm

10.30pm

Bumper to bumper traffic on Kalayaan Avenue meets people hunting for a parking slot and pedestrians who can't wait to finally enjoy the end of a work week.



10.30pm



Zones and Land Use

Based on the New Zoning Regulations for Makati stipulated in City Ordinance No. 2012-102, the different land uses within out zone are defined by the following terms:

HPZ - Heritage Preservation Zone

- Requires a Master Development Plan and Historical Preservation Guidelines

R-2 Medium Density Residential

- For medium density housing, with support commercial, service, and institutional uses on a neighborhood or barangay scale
- In the case of Poblacion, city hall has permitted a 45% non-residential and 55% residential use within the property.
- Maximum building height: 14 meters
- SPUR zones in the district adhere to R-2 conditions until they have approved plans for redevelopment.

C-1A and C1-B Low Density Commercial/Mixed-use

- For mixed-use and commercial developments on a local scale
- A Maximum FAR: 5
- B Maximum building height: 18 meters; maximum building coverage: 85%

C-2B Med Density Commercial/Mixed-use

- For medium density mixed-use and commercial developments
- Maximum FAR: 6

C-3B High Density Commercial/Mixed-use

- For high density mixed-use and commercial developments on a metropolitan scale of operations
- Maximum FAR for Non-residential: 8
- Maximum FAR for Residential: 16
- Maximum FAR for Mixed-use: 8 to 16, depending on allocations for each use.

INS Institutional

- For government, religious, cultural, educational, medical, civic, residential and supporting uses.
- Maximum FAR: 4

PUD Planned Unit Development

- Large government lots or lots consolidated into one (1) title which are in interim use until a Master Development Plan is approved

SPUR Special Precincts for Urban Redevelopment

- Created to make underutilized or declining low to medium density accessible to the Makati CBD, Special Mixed-Use Zones, or major thoroughfares into areas for new industries or start-up businesses
- To provide a mechanism for private-public sector collaboration for upgrading infrastructure and utilities, and other investments in the neighborhood
- Redevelopments require an approved Master Development Plan that conforms to the character of the Zone and a minimum of 5,000-square-meter area.

2013

- El Chupacabra
- Lokal Hostel

2014

- Señor Pollo
- Tambai

2015

- Z Hostel
- Crying Tiger
- Pineapple Lab
- Commune
- Kite Bar

2016

- Empingao!
- Bean & Yolk
- The Smokeyard
- Bucky's
- Element
- Pura Vida
- The Wild Poppy
- LOBO
- Bar Mathilde
- Alamat
- Yala Yala
- Holy Smokes

2017

- Dr. Wine
- Polilya
- The Ruins
- DULO
- Bao Bar
- OTO
- Wok By 4900
- The Social on Ebro
- The Apartment
- Joe's Brew
- I'M Hotel

2018

- Concepto
- Gaja Korean Kitchen
- NoKal
- Agimat
- Kermit Manila
- Ebi10
- 1898 Hotel
- ABKD
- Taqueria Seta
- Chuck's Deli
- Wantusawa
- Ms. Gee
- Estée
- YOI Sake Bar
- Loco Manuk
- Pedro Tap House
- Fyre

2019

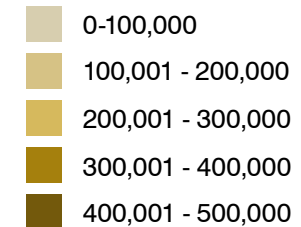
- FUTUR:ST
- Hineleban at Backwell

The Hangouts of Pobs: A Timeline

*This timeline is not an exhaustive list of establishments.

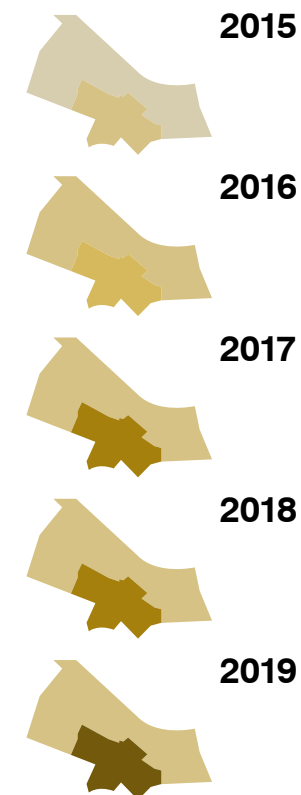


Land Values (PHP/sqm)



Land Values

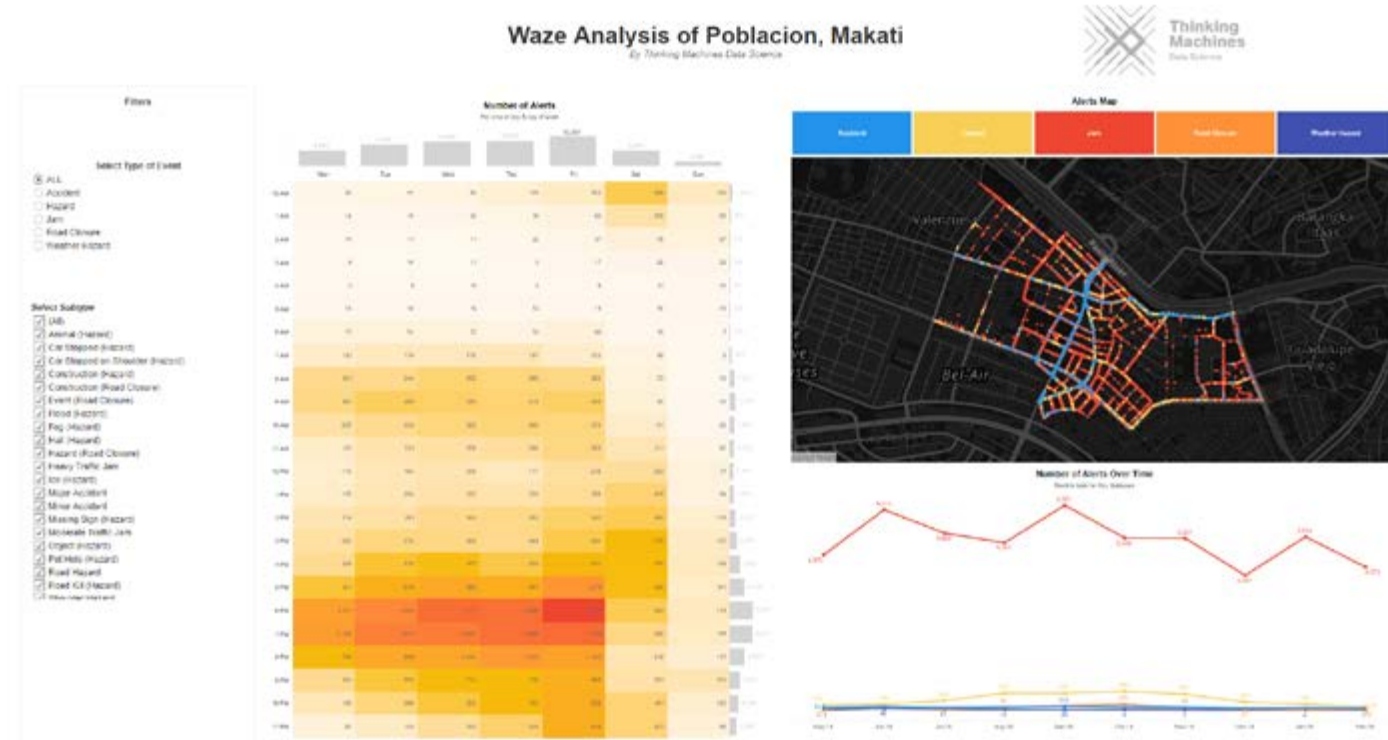
The first movers of Pobs were concentrated in SoKal and the edges of the existing entertainment district. 2016 marked the influx of more new establishments per year, many of which are located in the lots surrounding Kalayaan Avenue. Most, if not all, of these bars and restaurants are homegrown brands that were birthed in the area.



In the span of five years, land values are estimated to have doubled in the fringes of Poblacion and quadrupled in the main area, which is closer to Makati CBD.

Meanwhile, BIR zonal values have almost doubled in the span of two survey periods. Using Don Pedro Street as an example: residential lots were P80,000 per sqm in 2017 compared to P14,500 in 1997; and commercial lots, a result of rezoning, were P160,000 per sqm in 2017. Makati Avenue was P160,000 per sqm and Ayala Avenue P350,000 per sqm in 2017.

Note: Information in the diagram was obtained from publicly available sources and has not been independently verified by JLL. It contains propositions that are not purely historical in nature but are forward-looking. Illustrations are based upon certain assumptions that JLL in its discretion considers appropriate. It does not purport to contain all of the information that may be required to evaluate any potential transaction and should not be relied upon in connection with any potential transaction.



Traffic

For this study, the team produced a dashboard that consolidated a year's worth of Waze reported incidents (May 2018 to February 2019) within the boundaries of barangay Poblacion. Through this dashboard, we were able to isolate incidents by type. Conversely, one can also select a hour on the dashboard and see a breakdown of incidents within that time period. It also displays the number of alerts over time.

The dashboard publicly available online via: <http://bit.ly/TMWazePoblacion>

Insights

Accidents

- Highest in September 2018
- Most frequent on Fridays at 6pm and Thursdays at 7pm
- More minor accidents than major accidents
- Accident-prone streets
 - Makati Ave
 - JP Rizal Ave
 - Kalayaan Ave

Hazards

- Traffic light faults at the Makati Ave and Kalayaan Ave intersection
- Missing signs in JP Rizal Ave near Estrella St
- Animals in JP Rizal cor Makati Ave and Kalayaan cor Makati Ave
- Construction hazard in P. Burgos St and JP Rizal Ave

Traffic Jams

- Most frequent on Friday 6pm - Saturday 1am
- Highest in September 2018

Road Closures

- Frequent on Saturdays at 11pm
- Events spike in June and October 2018
- Construction in August - November 2018

Weather

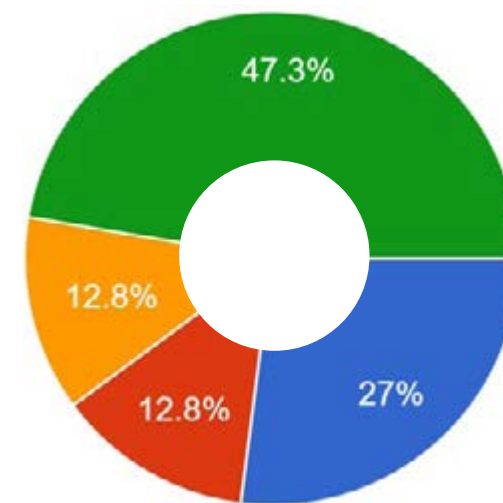
- Highest in June 2018
- Flooding predominantly reported on these streets:
 - JP Rizal Ave
 - Makati Ave
 - Makati-Mandaluyong Bridge

Online Survey

Using Google Forms, the team crafted a survey to measure public sentiment on Poblacion. It accepted responses from 21 February to 7 March 2019. Knowing that it may be difficult to reach long-time residents of Poblacion, hard copies of the survey were given to the barangay hall for distribution. The answered surveys were then returned to the team and their responses were fed into the online platform.

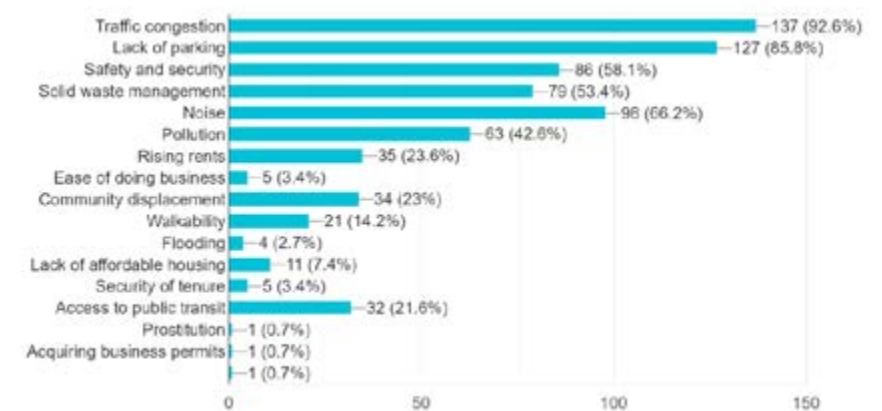
There were a total of 148 respondents: 46% percent of which are between 25-34 years old and 20% are 35-44 years old while the remaining percentages are of the other age groups. 47% live in Poblacion with an average length of residency of 24 years. The shortest residency period is 1 month while the longest is 60 years. 45% of the respondents work in Poblacion.

What is Poblacion to you today?



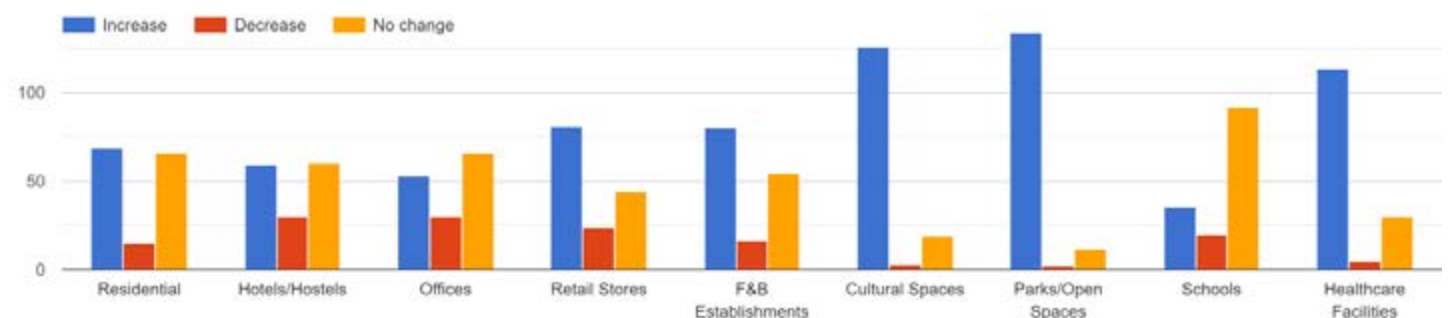
- A residential neighborhood
- Makati's celebrated heritage and civic quarter
- An upscale mixed-use commercial district
- A lively district of bars and restaurants

What are the 5 most pressing issues in Poblacion today? Check 5 from below that are of highest concern to you.



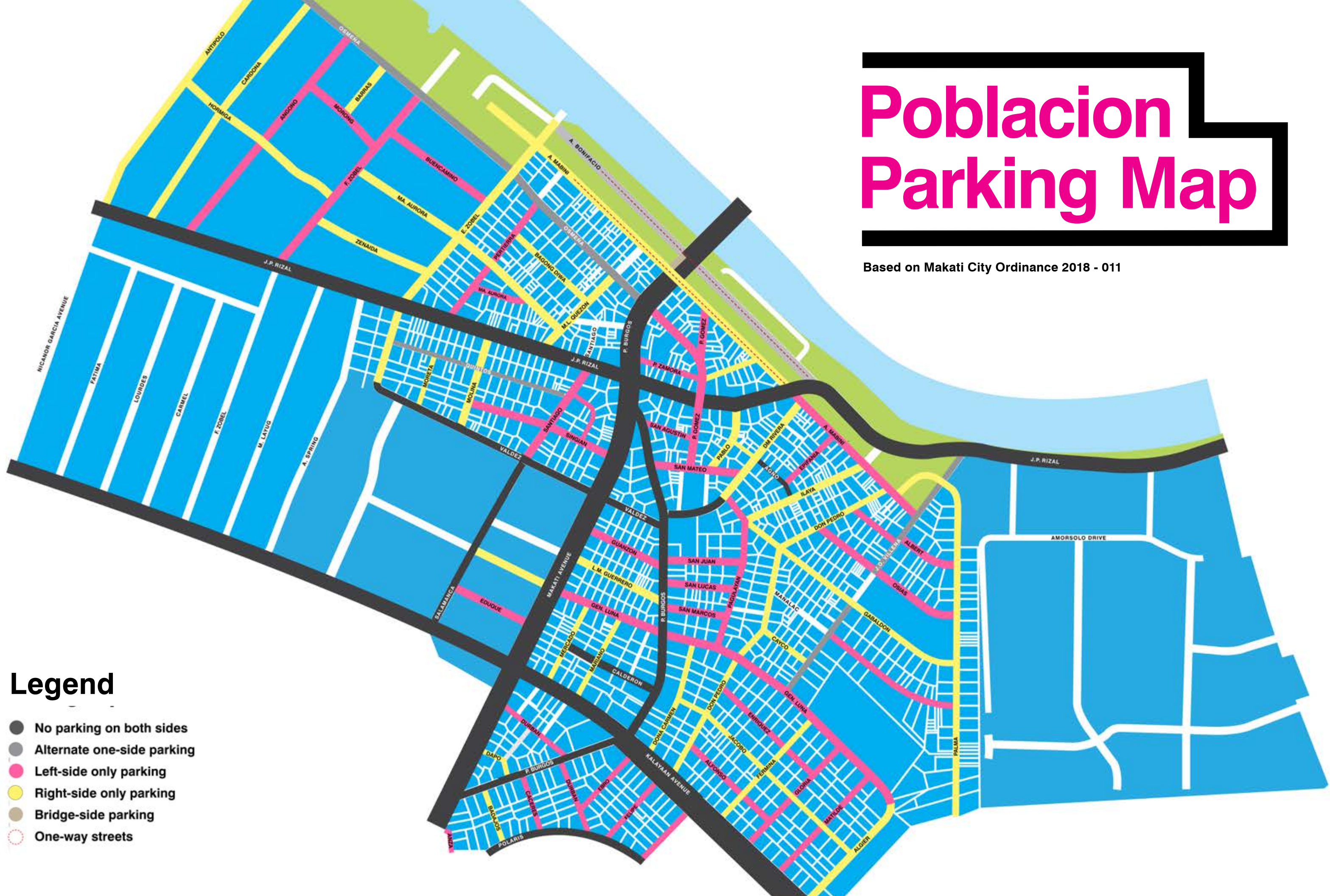
148 respondents

Indicate whether you would like to see an increase, decrease, or no change for the following types of spaces in Poblacion. Make sure to select one per space type.



Poblacion Parking Map

Based on Makati City Ordinance 2018 - 011



Legend

- No parking on both sides
- Alternate one-side parking
- Left-side only parking
- Right-side only parking
- Bridge-side parking
- One-way streets

The panel convened for a half-day working session on 13 March 2019 at NoKal in Poblacion. Thirty people, the panelists as well as representatives from the different stakeholder groups, attended the event. The main agenda was to probe and understand what Poblacion means to different stakeholders and how they envision its future.

The floor was open to anyone who wanted to speak in front of an audience while closed door interviews were also conducted with those who wanted a private chat with the panel. Insights from those sessions are consolidated below.

Pobs is unplanned.

- Makati City's Comprehensive Land Use Plan (CLUP) 2013-2023 was crafted in 2012 and did not foresee the influx of small businesses in Poblacion.
- Noise, litter, and damage to property are becoming more frequent complaints by residents to the barangay hall.
- One resident complaint can shut down a business and establishment owners have no means of verifying the validity of the complaint.
- Noise pollution standards are based on studies conducted in the 1980s. Some areas in Poblacion only allow up to 45 dB, which is comparable to the volume of conversational speech.
- Due to the recent popularity of the district, the local government has given a generous allowance of 45% for commercial use in residential (R-2) lots.
- With its one-of-a-kind bars and restaurants, Poblacion is a counterpoint to the rest of the city, which makes it highly popular among a generation on the lookout for new experiences.
- Organized crime is present in the area. The barangay has spotted a van unloading minors that would pickpocket. Apprehended minors are brought to the barangay hall and endorsed to the Department of Social Welfare and Development. However, many of them return to crime after being released to their guardians.
- Establishments hire their own security personnel, but the barangay also deploys their *bantay bayan* (patrols) in high-activity areas.
- Angkas, a motorcycle hailing app, is exploring the idea of a free transit service for Poblacion that is connected to off-site parking areas, specifically the ones in the CBD that are underutilized at night.

Bad traffic may be more palpable, but fire safety is the most urgent issue.

- Poblacion is not built to take on the foot traffic it is receiving today. So while traffic is an urgent issue, this district needs to review and quickly enforce stringent fire security measures.
- Sprinkler systems are good but they are expensive, and sprinklers only work when there is water. Manila has a water problem, so an easier solution is to require fire extinguishers in highly visible locations every 10 meters. Most of these bars are dark and crowded at peak hours. You need the extinguisher to be immediately accessible in an emergency.
- One fire can raze an entire block because the houses are built to line.
- We don't want another Ozone Disco incident to happen. On top of the traumatic loss of lives, that property has not traded ever since the fire in 1996.

Stakeholders

Mary Margarette Alabastro
Barangay Kagawad (local council)

Miko Villena
Barangay Kagawad

El Vasquez
Barangay Kagawad

Dwayne Samarista
Cultural Officer - City of Makati

Margo Flores
Marajo Group (developer)

Marco Viray
Business owner - Joe's Brew
Nokal, Tambai, Ebi10

Xenon Walde
Resident

Robert Abano
Resident

Stakeholder Input

Inside one of the establishments along Don Pedro Street



The TAP Event at Nokai



Residents want to retain the old soul of Poblacion, so do the entrepreneurs.

- Longtime residents like the quiet low-density Poblacion they grew up in. They see the new businesses as threats to their way of life. Old families have left because of the drastic changes in the neighborhood and the pressure to sell their property.
- Poblacion does not aspire to be Vigan or Intramuros because that is not who we are, but we need a place where we can highlight our traditions and where people can understand how Makati began.
- A conceptual plan for the heritage zone was created in 2006, but there is no detailed master plan and development guidelines yet.
- The heritage zone is the anchor of Poblacion. Heritage and local businesses need to complement each other, and can drive traffic to one another.
- There are entrepreneurs who have family ties in Poblacion or even grew up in the district, and, thus, care about its history.
- How do we maintain the current Poblacion atmosphere while safeguarding the old town? The establishments here are homegrown. There are no big chain stores. Entrepreneurs like the local creative spirit of the district.

Key Takeaways of the Panel:

1. Poblacion needs to craft vision for itself. This can draw out stakeholders from their silos so that they can become part of a bigger picture.
2. Currently, the district is composed of fragmented and competing voices. The commercial association needs to be more active. Residents may need to organize themselves as well or have representation in the existing organization. The local government will have an easier dialogue with an organization rather than individuals.
3. There are opportunities to repurpose the larger lots like the market and second high school to spur new growth and to carry out the vision.
4. The government needs to clarify planning and transport regulations such as SPUR and new forms of mobility.
5. Individuals can consolidate property, submit a master development plan, and gain upzoning, something the CLUP allows and provides guidelines for. In effect, everyone participates in the value gain.

Recommendations

Goals	Domain	Data Analytics Application	Policy and Action
Short Term: Alleviate vulnerabilities and stabilize	Create a more inclusive district organization Articulate common Visions for Poblacion	Use a tech platform to enable transparent citizen involvement and availability of information Documentation of district status over time using metrics	Enact early wins: <ul style="list-style-type: none"> • Implement district-specific fire safety measures • Temporary reallocation or trading of commercial zone allowances • Create a detailed master plan and specific development guidelines for the Heritage Zone • Identify and broker agreements with off-site parking areas with bike parking and waiting areas • Test one-way circulation patterns
Medium Term: Improve operations as a city district	Establish an improvements fund (e.g. Business Improvement District - BID) Activate and socialize the Poblacion Visions	Explore fintech funding methods: <ul style="list-style-type: none"> • Formulaic funds from businesses • Residential contribution through rights transfer • Strong governance Barangay to earmark city funds	Deploy tech-enabled personnel during peak hours: <ul style="list-style-type: none"> • Neighborhood concierges and safety officers for incident response • Traffic officers informed by Waze • Personnel are first-aid trained Fund tangible streetscape fixes: <ul style="list-style-type: none"> • Safer sidewalks • Street lighting • Electrical safety • Sewer maintenance
Long Term: Low Carbon, High Density, Authentic Growth	Organize into SPUR subzones Define compatibility of businesses allowed in the area	Create performance-based design guidelines: <ul style="list-style-type: none"> • Digital assessment • Carrying capacity driven FAR allowance • Density rights transfer from heritage zones • Streetscapes celebrating Makati poblacion history • Variations fund BID 	Create a Design and Planning Board <ul style="list-style-type: none"> • Screen locators based on criteria (e.g. entrepreneurial, complimentary, impact, etc.) • Enforce district operational guidelines • Innovations toward a transit-oriented district: <ul style="list-style-type: none"> • Parking maximum or none at all • Bike and walking-first policies • Inclusive walkable services, food market, schools • High-speed connectivity to encourage low-impact users and businesses • Smart monitoring of water, waste, and flooding

Conclusion

P

Poblacion is experiencing the conflicts of gentrification. Lower rents, proximity to the Makati CBD, and recent mixed-use developments in the barangay have made it an attractive start-up area for Filipino entrepreneurs and restaurateurs. The new wave of establishments is unsurprisingly shaking up a nightlife scene as well as the old way of life in Makati's heritage zone.

Longtime residents, yearning for the quiet they once had, are just waiting for the tipping point—for the next new hip district to blip on the radar and draw the riot away. Meanwhile, the young businessfolk, many of whom have or have developed roots in the neighborhood, fear that the creative atmosphere will dissipate with fully commercial zoning. In order for Poblacion to ride on its success well beyond its most hyped years, economic growth and authenticity must complement each other. There are multiple ways to intertwine: from the transfer development rights, building a community fund, to thoughtful seasonal programming.

Poblacion has already been earmarked by Makati's Comprehensive Land Use Plan for conservation (HPZ) and redevelopment (SPUR). It was crucial for our team to present how these two zones are mutually beneficial and

really distill the city's character. If managed well, Poblacion can be the epicenter for homegrown urban culture.

All cities need business incubators, and these spaces are opportunities to expose young entrepreneurs to the processes of running businesses in the city. Conversely, working with them can also spark ideas for upgrading existing systems. Think of it as succession planning for cities.

The initial vibrancy of these incubators are due to location. However, their longevity is dependent on a clear strategy and good enforcement because real estate value inevitably drives out the authenticity of a place. The technology available (plus those being developed) today helps a city quantify intangible value that can be factored into future-ready planning policies that will benefit the different stakeholders in the community.

Poblacion is not a solitary case. There's Sai Ying Pun in Hong Kong, Jalan Sultan and Petaling in Kuala Lumpur, Thong Lor in Bangkok, the French Concession in Shanghai, and more. **Our team hopes that this ULI TAP initiative for Poblacion will engender more collaborations between firms and individuals to harness their expertise for the improvement of a locale**—whether it be experiencing gentrification or a whole different set of issues. Future teams may adopt and scale our study.

The city, being a cornucopia of challenges and personalities as well as joys, will always force those who care for it to think beyond their personal range of knowledge. We found this exercise most insightful when we placed our own ideas on hold and paid full attention to somebody else's.



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Unless otherwise noted, all photographs are provided by Angel Yulo

p.5
TAP event photo by Eric Manuel

p.6
Poblacion Church by Nissip via
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p.7
Museo ng Makati by Claire Algarme via
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TAP event photos by Group Five
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