

# CEE Property Forum 2018 - Vienna, Austria

**19th September 2018**

## **19:00-22:00 PRE-CONFERENCE NETWORKING RECEPTION SPONSORED BY CBRE, ERSTE GROUP BANK, ZEUS CAPITAL MANAGEMENT**

Exclusive networking reception hosted by Erste Group Bank at Erste Campus. Buffet dinner, gin and tonic bar, exclusive Austrian wine selection, Champagne bar. The gin and tonic bar will be sponsored by CBRE and the Champagne bar will be by Zeus Capital Management.

Venue: Erste Campus (1100 Vienna, Am Belvedere 1)

Free shuttle bus service will be available from the Imperial Riding School Vienna Hotel to Erste Campus.

Departure times: 18:40, 19:30, 20:00

**20th September 2018**

## **08:30-09:00 REGISTRATION**

### **Section 1: Property investment in Europe - The big picture (Blue Room)**

After years of continued expansion on Europe's property market, it is time to ask the question: how long will this current growth last? The market sentiment is still positive but concerns over rising interest rates, disruptive technologies, rapidly changing tenant needs and issues like global warming or persisting political uncertainty are making investors rethink their long-term strategies.

In a dynamically changing and increasingly unpredictable world, it is hard to keep up with trends. The goal of CEE Property Forum is to help real estate professionals explore future strategies by bringing together market leaders and industry experts from all over Europe. The first presentation of the conference will provide an overview of the key economic trends affecting the real estate market. This will be followed by two interdisciplinary panels which will discuss the current investment and financing landscape not only in the Central and Eastern European region but the entire continent.

#### **09:00 - 09:10 Welcome speech**

People:

**Csanád Csürös**, CEO, Property Forum

**Silvio Estienne MRICS**, Board Member, RICS Europe World Regional Board

#### **09:10 - 09:30 Rising interest rates and growing uncertainty - What does this mean for property investments?**

People:

**Pasquale Diana**, Head of Research, AComeA SGR

**09:30 - 10:20 Fighting for the best assets - Risks & rewards on the investment market**

Chair: **Jean-Bernard Wurm**, Co-Founder & Managing Director, Secure Legal Title, London

Conversation participants:

**Mike Atwell**, Head of Capital Markets Czech Republic and Lead Director CEE, JLL

**Tomáš B?hounek**, Partner, bnt attorneys in CEE

**Dr. Piotr Go?dziewicz MRICS**, Head of Transactions CEE, Cromwell Property Group

**Lila Pateraki**, Chief Investment Officer, Zeus Capital Management

**James Quill**, Director, Transactions, Prologis

**10:20 - 11:00 The era of free money might be over soon - New financing strategies**

Chair: **Tim Wilkinson MRICS**, Head of European Acquisitions, Indotek Group

Conversation participants:

**Luke Dawson**, Managing Director & Head of Capital Markets CEE, Colliers International

**Martin Erbe**, Head of International Real Estate Finance Continental Europe, Helaba

**Dieter Knittel**, Head of CEE, pbb Deutsche Pfandbriefbank

**Andreas Naujoks**, Partner, Head of International Banking & Finance, Noerr

**Richard Wilkinson**, Group CFO, CTP

**Hannes Wimmer**, Managing Director, Loan Capital Markets, Erste Group Bank AG

**11:00 - 11:30 Coffee break**

**Section 2: The future of real estate (Blue Room)**

This year's conference is centred on the topic of technology. Innovation is reshaping the property industry which is why CEE Property Forum aims to prepare guests for future changes by analysing current trends during the panel discussions of the day and by gathering speakers to share their vision for the next phase of the profession.

The second section of the day will feature two renowned speakers who will share their thoughts on digitisation in the property sector and key proptech trends influencing the industry. The presentations will be followed by a visionary panel discussion on the future of real estate developments.

**11:30 - 11:50 Digital transformation in the property sector**

People:

**Javier Kindelan Williams FRICS**, CEO, EMEA Valuation & Advisory Services, Vice President, CBRE Spain

**11:50 - 12:10 Innovation in real estate – Top proptech trends influencing the industry**

People:

**James Dearsley**, Consultant and Board Advisor, Unissu

### **12:10 - 12:50 How to develop buildings for the next generation?**

Chair: **Silvio Estienne MRICS**, Board Member, RICS Europe World Regional Board

Conversation participants:

**Szilvia B?sze**, Sustainability Consultant, EU environment and climate policy expert, ESG auditor, ProptechZoom

**Pál Dános MAISZ MRICS**, Director, KPMG

**Glyn Evans MRICS**, Head of Design & Build CEE, Cushman & Wakefield

**John J Fekete MRICS**, Executive Director - Saudi Arabia, Head of Consulting Services – MENA, JLL

**Lara Paemen**, Managing Director, IFMA EMEA

## **12:50- 13:50 Lunch break**

### **Section 3/A: New rules, new technologies (Blue Room)**

This section will take a closer look at two lines of business that are deeply affected by technology: workplace solutions and valuation.

The concept of the ideal office space has changed tremendously in recent years. New ways of working and new technologies are giving landlords a run for their money. The first, very diverse panel will talk about what makes an office attractive in 2018 and what it will take to secure new leases and keep existing tenants happy in the years to come.

The automation and digitalisation of valuation (and the entire investment process) can pose a threat to valuers and agents. The second expert panel will debate whether this is something that real estate professionals already need to deal with.

### **13:50 - 14:25 How to create a future-proof workplace?**

Chair: **Monika Rajaska-Woli?ska MRICS**, Managing Partner, Poland, Colliers International

Conversation participants:

**Karolina Dudek**, Associate Director | People & Places Advisory, Colliers

**Natalia Kiskova**, Global Head, HubHub

**Maciej Markowski**, CEO & Co-Founder, spaceOS

**John Newton MRICS**, Managing Director, Tétris

### **14:25 - 15:00 Will robots replace valuers? - The future of valuation**

Chair: **James Dearsley**, Consultant and Board Advisor, Unissu

Conversation participants:

**Barbora Dermeková MRICS**, Head of Valuation, JLL

**Wolfgang Feilmayr**, Methodical Advisory - Valuation, Datascience Service GmbH

**Richard Hogg HypZert MRICS**, Head of Valuation, Advisory and Research for Czech Republic and Slovakia, Cushman & Wakefield

**Ferenc Németh MRICS**, Real Estate Expert, Erste Group Collateral Management

**Leandro S. Escobar Torres REV MRICS**, Managing Director, Professional Association of Valuation Companies of Spain

### **Section 3/B: New European investment destinations (Purple Room)**

Core CEE markets tend to overshadow the countries of Southeastern Europe but there is a lot to watch out for in this region. Purchasing power and demand for modern space is growing, so it is no wonder that new developers and investors keep entering the market. Besides a couple of established investment destinations, numerous major cities in these countries offer untapped potential for those willing to take higher risks for higher rewards. In the two panels of this section, one of them dedicated to Romania, the region's largest market, key local players will make their case and show why it is worth investing in SEE.

### **13:50 - 14:25 Romania - Will the market cool down before it truly heats up?**

Chair: **R?zvan Gheorghiu-Testa**, Partner - Co-Head of Real Estate Practice Group, ?uca Zbârcea & Asocia?ii

Conversation participants:

**Fulga Dinu**, Country Manager Operations, Immofinanz Romania

**Ana Dumitrache**, Country Manager, CTP

**Hedwig Höfler**, Head of Investment Management, CA Immo

**Ulf Pleschitschnig**, Managing Director, Morgan Stanley Real Estate Investment

**Andrei V?caru**, Head of Capital Markets CEE, iO Partners

### **14:25 - 15:00 Europe's dark horses join the race - Investments in SEE**

Chair: **Andrew Peirson MRICS**, Managing Director, JLL Czech Republic

Conversation participants:

**Boštjan Brantuša**, Manager of Expansion and Development Croatia, SES Spar European Shopping Centers

**Tanya Kosseva-Boshova MRICS**, Managing Partner, Park Lane Developments

**Maja Ostanek MRICS**, Director, ALFI Real Estate Fund

**Charalampos Pandis MRICS**, Partner, Bluehouse Capital

**Zorana Zdrale Burlic**, CEO, Delta Real Estate

## **Section 3/C: Asset classes on the rise (Green Room)**

Student housing has already become an attractive investment product in Western Europe and there are signs of such developments in the region as well. CEE is the number one choice of more and more international students, so the opportunity is present. The regional pioneers of the business and other experts will come together to share their ideas and experience in the first panel of this section.

Tourism is booming in Central and Eastern Europe, new developments are popping up all over the region, while hotel has become a popular asset class among investors. The needs of travellers are changing fast with low-cost flights and the sharing economy completely reshaping the face of tourism. The experts of the second panel will give an overview of the latest trends on the hotel market, both globally and locally.

### **13:50 - 14:00 New trend in Europe - Investment opportunities in student housing**

People:

**Michal Malecka**, Head of Business Development, StudentMarketing

### **14:00 - 14:30 Student housing - Investment opportunities in CEE**

Chair: **Stefan Kolibar**, Chief Partnerships Officer, BONARD

Conversation participants:

**Johannes Bauer**, Asset Management CEE, S+B Gruppe

**Axel Drwenski**, Head of Real Estate Research & Strategy, Commerz Real

**Alexander Gulya**, Managing Director, International Campus Austria GmbH

**Cristoph Lukaschek MRICS**, Head of Capital Markets, Otto Immobilien

#### **14:30 - 15:00 How do hotels successfully compete with other real estate classes?**

Chair: **Marius Gomola MRICS**, Managing Director, Horwath HTL Hungary, Founder, HOTCO

Conversation participants:

**Andreas Gross**, Head of Hotel Investment, B&L Gruppe

**Frank Hildwein**, Head of Hotel Acquisitions and Sales, Deko Immobilien

**Rupert Simoner**, CEO, Vienna House

### **15:00 - 15:30 Coffee break - candy bar**

## **Section 4/A: The race to attract investors continues in CEE (Blue Room)**

The core markets of the region continued to boom in 2018 with year-end figures expected to be on par with or in some cases exceed the results of 2017. At the same time, the voices of those who think that these markets have already reached the peak of the current cycle seem to be growing louder. That in itself is no reason for concern; still, it may be time for market players to come up with long-term strategies that can work in a period of less buoyant growth. Local investors, developers and advisors will share their expectations for the future of the Czech, Slovak and Hungarian markets.

#### **15:30 - 16:10 Czech Republic and Slovakia insight**

Chair: **Miroslav Barnáš MRICS**, Supervisory Board Member, Transactions, ARETE

Conversation participants:

**Marián Fridrich MRICS**, Head of Slovakia, Cushman & Wakefield

**Erwin Hanslik**, Partner and CEE Head of Real Estate, Taylor Wessing Czech Republic

**Tomáš Jandík CFA MRICS**, CEO, REICO

**Péter Számely MRICS**, Head of Real Estate Finance CEE, HYPO NOE Landesbank

#### **16:10 - 16:50 Hungary investment and development roundtable**

Chair: **Zsolt Jakab MRICS**, Senior Investment Consultant, CBRE, Member of the Board, RICS in Hungary

Conversation participants:

**Michael Edwards MRICS**, Head of Capital Markets (Hungary) / Valuation & Advisory (Central Europe), Cushman & Wakefield

**Zoltán Nádasdy MRICS**, Partner, Head of CEE Real Estate Investments Group, Noerr

**Benjamin Perez Ellischewitz**, National Director, Head of Capital Markets Hungary, JLL

**Tibor Tatár MRICS**, CEO, Calyx Investment

**Gergely Árendás**, Chairman, Ingatlanfejlesztési Kerekasztal Egyesület (IFK)

## **Section 4/B: All about user experience (Purple Room)**

The global retail landscape is shifting rapidly. Changing consumer habits are making not only retailers but developers and owners of logistics and retail property rethink their strategies. Businesses need to react to the growing popularity of online shopping fast as consumers need to feel that shopping malls are much more than just offline stores put next to each other. These two panels will look at how retailers can improve user experience and how the logistics market can benefit from these changes.

**15:30 - 15:50 The future of shopping destinations**

People:

**Riccardo Marini**, Founder, Marini Urbanismo

**15:50 - 16:20 It's time to reinvent the concept of the mall**

Chair: **Walter Wölfler**, Senior Director, Head of Retail Austria & CEE, CBRE

Conversation participants:

**Clemens Bärenthaler**, Partner, Taylor Wessing Czech Republic

**Riccardo Marini**, Founder, Marini Urbanismo

**Savino Natalicchio**, ?Director of Retail & Shopping Center Business Unit, Duff & Phelps

**Martin Sabelko**, Managing Director Austria, Warburg-HIH Invest Real Estate GmbH

**Iлона Taillade**, CEO and Co-Founder, BrandSpots

**16:20 - 16:50 E-commerce is taking the logistics market to new highs - What's next?**

Chair: **Filip Kozák MRICS**, Director of Corporate Real Estate CEE, DHL Supply Chain

People:

**Ferdinand Hlobil**, Head of Industrial Agency CEE, Cushman & Wakefield

**Jim Orsel**, Head of Industrial & Logistics | Netherlands, Colliers International

**Martin Polák**, Managing Director, Regional Head CEE, Prologis

**16:50 Closing remarks**