Date: 19th - 20th September 2018 **Venue:** Imperial Riding School Renaissance Vienna Hotel

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 Managment.

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 Presentation Welcome speech

Speaker:

Csanád Csürös, CEO, Property Forum

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

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

Speaker:

Pasquale Diana, Head of Research, AComeA SGR

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

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

Panellists:

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

Tomáš Běhounek, Partner, bnt attorneys in CEE

Dr. Piotr Goździewicz 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 Panel The era of free money might be over soon - New financing strategies

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

Panellists:

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 **Presentation** Digital transformation in the property sector

Speaker:

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

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

Speaker:

James Dearsley, Consultant and Board Advisor, Unissu

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

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

Panellists:

Szilvia Bősze, 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 **Panel** How to create a future-proof workplace?

Chair: **Monika Rajska-Wolińska MRICS**, CEO | CEE, Colliers

Panellists:

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 **Panel** Will robots replace valuers? - The future of valuation

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

Panellists:

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, Cushma

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

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

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 **Panel** Romania - Will the market cool down before it truly heats up?

Chair: **Răzvan Gheorghiu-Testa**, Partner - Co-Head of Real Estate Practice Group, Ţuca Zbârcea & Asociaţii

Panellists:

Fulga Dinu, Country Manager Operations, Immofinanz Romania

Ana Dumitrache, Country Manager, CTP

Hedwig Höfler, Head of Investment Management, CA Immo

Ulf Pleschiutschnig, Managing Director, Morgan Stanley Real Estate Investment

Andrei Vacaru, Head of Capital Markets CEE, iO Partners

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

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

Panellists:

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 **Presentation** New trend in Europe - Investment opportunities in student housing

Speaker:

Michal Malecka, Head of Business Development, StudentMarketing

14:00 - 14:30 Panel Student housing - Investment opportunities in CEE

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

Panellists:

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 Panel How do hotels successfully compete with other real estate classes?

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

Panellists:

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

Frank Hildwein, Head of Hotel Acquisitions and Sales, Deka 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 Panel Czech Republic and Slovakia insight

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

Panellists:

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 Panel Hungary investment and development roundtable

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

Panellists:

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

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, Ingatlanfejlesztői 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 costumers 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 Presentation The future of shopping destinations

Speaker:

Riccardo Marini, Founder, Marini Urbanismo

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

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

Panellists:

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

Ilona Taillade, CEO and Co-Founder, BrandSpots

16:20 - 16:50 **Presentation** 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

Speaker:

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

Please note that the program is subject to change. Always check the latest online agenda here:

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