Date: 20th - 21st September 2023 **Venue:** Palais Niederösterreich / Hotel Hyatt Andaz

CEE Property Forum 2023 - Vienna, Austria

20th September 2023

Study tour – Visit CEE's most sustainable neighbourhood!

12:30 - 15:45 **Presentation** Study tour to Vienna's Aspern Seestadt

Participants of CEE Property Forum 2023 have the chance to join us for a unique study tour free of charge and visit the region's most sustainable neighbourhood and one of Europe's largest urban development projects, Aspern Seestadt in Vienna.

Aspern Seestadt is a mixed-use project worth €5 billion and is already home to 11,000 people and 500+ companies. Besides incorporating numerous 'smart city' features and unique sustainability solutions, the project is also a prime example of the world-famous Viennese housing model with 70% of the apartments part of the city's social housing system.

The tour departs at 12:30 from the lobby of Andaz.

Your ride between venues – Travel back in time

Are you staying at Andaz or nearby? We've arranged two rides by a historic tramcar (built in 1927) to take our guests from Andaz to Palais Niederösterreich, the venue of our networking party. **Trams depart at 17:00 and 17:45.** If you'd like to take advantage of this free-of-charge transfer option, meet our team in the lobby of Andaz at the indicated times. (The journey takes 30 minutes and involves 10 minutes of walking.)

WARM-UP PARTY – Venue: Palais Niederösterreich

18:00 - 18:30 **Presentation** Registration & welcome drinks

18:30 - 21:00 Presentation Warm-up Party

The Warm-up Party is an exclusive networking event taking place on the evening of 20 September at the magnificent Palais Niederösterreich in the historic heart of Vienna. Join us to enjoy our food and drink offer, including several uniquely themed bars:

Champagne Bar: An ageless classic that sparkles with life as it is poured, courtesy of Avison Young. Enjoy a carefully selected compilation of Europe's best bubblies.

Oyster Bar: The most sought-after dish of previous CEE Property Forums is back. Indulge in the Mediterranean Sea's best treat, chilled to perfection.

CEE Wine Bar: A tribute to what the beautiful vineyards of our region have to offer. Our friends and partners across CEE have helped us put together a unique wine list with each CEE being represented.

21st September 2023

CONFERENCE DAY – Venue: Andaz Vienna Am Belvedere

7:00-8:00 – MORNING NETWORKING RUN SPONSORED BY TAYLOR WESSING

A casual morning run with fellow real estate runners starting from Hotel Andaz. You can either go for a shorter run (5 km) through the neighbouring Schweitzergarten and the breathtaking Belvedere Park - led by Viennese runner and personal trainer Verena Ullmann or you can go more hardcore and take the longer city tour (10 km) to the city centre and back. The longer city run will be led by longtime runners from the Taylor Wessing leadership: Erwin Hanslik (CEE Head of Real Estate and Head of the Prague office) and Dániel Ódor (Partner and Head of Real Estate of the Budapest office).

08:00-08:30 – REGISTRATION WITH WELCOME COFFEE & FRENCH PASTRY SELECTION

SECTION 1: FOCUSING ON WHAT'S NEXT

08:30 - 08:40 **Presentation** Welcome remarks by Property Forum

Following the welcoming words of Property Forum's CEO, the host of the day will introduce the agenda.

James Dearsley is a global proptech and innovation guru who looks at industry problems a little differently. His whole career has been built on understanding many of the industry challenges in relation to change and digital transformation and is currently writing a book about leadership and transformation in the real estate sector.

Speaker:

Csanád Csürös, CEO, Property Forum

James Dearsley, Consultant and Board Advisor, Unissu

08:40 - 09:00 **Panel** Let's set the scene for the day – Cracking the code for 2024

An exclusive, interview-style discussion, aimed at setting the scene for the day. Our host James will talk to two seasoned investment experts and walk through the key topics that are currently on investors' minds.

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

Panellists:

Marcus Cieleback, Chief Economist, Investment Strategy & Research, PATRIZIA SE

Anna Duchnowska, Managing Director – Investment Management, Invesco Real Estate

09:00 - 09:20 **Presentation** Disruption and opportunity in the age of AI – Impacts on the broader economy and potential applications in real estate

We've all had our fun with ChatGPT but why is 2023's biggest buzzword actually relevant for real estate? Research scientist and renowned JPMorgan expert Tamas Madarasz will shed light on the latest AI applications and trends reshaping the industry.

Speaker:

Tamás Madarász, Decision Science Team Lead - Vice President, JPMorgan Chase & Co.

09:20 - 09:45 **Presentation** No more reasons for headaches? – A global outlook for the year ahead

CBRE's Global Chief Economist and Managing Director for CEE will provide a unique overview of the key trends influencing property investments - globally and in the region.

Speaker:

Richard Barkham, Global Chief Economist, CBRE

Daniel Bienias MRICS, Managing Director CEE & Poland, CBRE

09:45 - 10:30 **Panel** The big picture – CEE investment trends under the spotlight

The question on everyone's mind: When will investment markets come back to life? Our group of investment experts will share their expectations and shed light on which assets and markets offer the best opportunities for players willing to take a risk.

Chair: **Ana Dumitrache**, Managing Director, CTP Romania

Panellists:

Jan Bukovsky, Senior Partner – Head of Tax & Finance, Revetas Capital

Victor Constantinescu, Partner, Co-Head of Real Estate, Kinstellar

Christopher Mertlitz, Managing Director, Head of European Investments, W. P. Carey

Dominik Stojek, Partner, Leader of Real Estate Group, Deloitte Poland

Piotr Trzciński, Head of Poland, Savills Investment Management

Andrei Văcaru, Head of Capital Markets CEE, iO Partners

10:30-11:00 – COFFEE BREAK WITH SACHER CAKE CORNER SPONSORED BY KAUFLAND

SECTION 2: WHAT SELLS?

11:00 - 11:45 Panel Lenders vs borrowers – A deep dive into financing strategies

Inflation across Europe is cooling down but interest rates are still at historical highs. Leading bankers and investment experts will discuss how their financing strategies are adapting.

Chair: **Csanád Csürös**, CEO, Property Forum

Panellists:

Inga Chkhaidze-Heynen, Partner – Head of Investments, Revetas Capital

Dieter Knittel, Head of CEE, pbb Deutsche Pfandbriefbank

Zbigniew Korba, Partner, Head of Banking & Finance Poland, Taylor Wessing Czech Republic

Marius Perșenea, Chief Operating Officer, IULIUS Company

Florian Schmidl, Tax Partner, Mazars Austria

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

11:45 - 12:30 Panel Let's talk strategy – What's driving ESG investments in 2023?

Seasoned industry experts will provide a comprehensive exploration of ESG integration within the real estate sector, showcasing the industry's evolving commitment to sustainable practices, social inclusivity, and responsible governance.

Chair: **Tjidsger Wierda**, ESG Partner, Walvius Partners

Panellists:

Ionut Bindea, Investment Manager, ROCA Investments

Zsolt Hintenberger, Managing Partner, Realiscon

Alena Líškay Králíková, ESG Manager, Crestyl

Marcell Mihályfi, Partner, Head of Office Asset Management, Adventum International

Daniel Schreiner, Principal ESG Asset Management, Deutsche Investment

Ryan Wray, Managing Director and Principal, Avison Young, Czech Republic

12:30 - 13:15 Panel Local investors continue to rule the land – Where to invest next?

Despite the slowdown, the CEE investment market remains strong with local investors playing a more vital role than ever. The most active dealmakers will discuss what sells today and will drive market activity tomorrow.

Chair: **Mark Richardson**, Head of Investment, Savills Poland

Panellists:

Krisztián Hornok MRICS, Managing Director, International Transactions and Asset Management, Indotek Group

Alexander Klafsky, Managing Partner, FLE

Péter Kocsis MRICS, Deputy CEO - Strategy, Risk, MIS-Data, WING

Martin Ofner, Head of Market Analysis, Arnold Investments

Karol Pilniewicz, CIO, Futureal

Pavel Streblov MRICS, Business Director, Penta Real Estate

Gábor Zeller, Senior Director, Capital Markets, iO Partners

13:15-14:15 –NETWORKING LUNCH

SECTION 3/A: INVESTORS' FAVOURITES (MAIN ROOM)

14:15 - 15:00 Panel Full speed ahead – What's driving logistics developments?

Demand for logistics assets remains steady across CEE, fueled by growing e-commerce and nearshoring. Market experts with diverse backgrounds will discuss the key drivers of this sector.

Chair: **Przemysław Piętak**, Supply Chain Advisory Director Poland / CEE, CBRE

Panellists:

Grzegorz Chmielak, Head of Valuation & Capital Markets, AXI IMMO

James Fitzgerald, Director, Head of Industrial Agency, iO Partners

Andreas Kozma, Founder & CEO, iREMS International AG

Ivan Pastier, Business Development Director, CTP

Peter Solt, Partner, Head of Real Estate Austria, Taylor Wessing Czech Republic

15:00 - 15:45 Panel Still not slowing down – CEE residential market update

Residential markets in CEE are standing strong against all odds with the conversation shifting to focus on affordability and sustainability. Leading developers will discuss growth opportunities in the sector.

Chair: **Radek Kučera**, Partner & Founder, Grafton

Panellists:

Marek Blaha, CEO, DBCS

Ján Krnáč, CEO, Cresco Real Estate

Mariusz Mroczek, Director, Corporate Finance, CEE, Colliers

Rudolf Riedl MRICS, Managing Director, SÜBA Hungary

Piotr Staniszewski, Partner, Dentons

15:45 - 16:30 Panel Coming back strongly – Hotel market update

Discover the future of hospitality in an engaging discussion on hotel market trends. Join industry leaders to dissect the latest insights, technological innovations, and shifting consumer preferences shaping the hotel landscape.

Chair: **Paweł Nowakowski MRICS**, Founder & CEO, PNC

Panellists:

David Jenkins, Vice President Business Development Eastern Europe, Radisson Hotel Group

Adam Konieczny MRICS, Development Director Europe, Louvre Hotels Group

Andreas Mayr, Managing Director, UBM hotels Management GmbH

Andrea Rona, Group Director of Development, Danubius Hotels

SECTION 3/B: THE CLASSICS (BLUE ROOM)

14:15 - 14:30 Presentation Revitalization as an opportunity for future retail core-assets

Speaker:

Angelus Bernreuther, Head of Investor Relationship Management, Kaufland

14:30 - 15:15 **Panel** Rediscovering retail – Strategies for an omni-channel future

No matter how many times experts predict the death of brick-and-mortar retail, it always reinvents itself. Investors are also showing renewed interest in the sector and this thought-provoking panel will explain why.

Chair: **Tomas Cifra**, Partner & Managing Director Central & Eastern Europe, Mitiska REIM

Panellists:

Angelus Bernreuther, Head of Investor Relationship Management, Kaufland

Josef Malíř, Executive Director, SCF

Adrian Pop, General Manager, ADP green building

Carmen Ravon, Head of Retail Occupiers CEE, CBRE

15:15 - 15:30 **Presentation** Financial system implementation - Lessons on how to implement a Unified Data Model successfully

More than half of real estate ERP projects are late and over budget. Industry veteran Andreas Kozma will show how these traps can be avoided and how the best functionality can be delivered while keeping within time and budget.

Speaker:

Andreas Kozma, Founder & CEO, iREMS International AG

15:30 - 15:45 **Presentation** The digital lifecycle of a building – Optimising efficiency, sustainability and occupant comfort

Speaker:

Ivan Petras, Country Manager Slovakia, PlanRadar

15:45 - 16:30 **Panel** Hybrid is here to stay – How to make the most out of office investments?

Similarly to retail, office investments are also experiencing a revival. Investors definitely look at offices differently than before the pandemic and this requires a new approach. A diverse group of experts will discuss the key drivers of office investment strategies with a focus on flexibility.

Chair: **Mihai Paduroiu**, CEO Office and Commercial Division, One United Properties

Panellists:

Hubert Abt FRICS, CEO, workcloud24

Alisa Kapic, Vice President Sales North Europe and Country Director Austria, IWG plc

Kata Mazsaroff, Managing Director, Colliers Hungary

Sylwia Toczyska, Associate Partner, Deloitte

SECTION 3/C: EMERGING MARKETS (GREEN ROOM)

14:15 - 15:00 **Panel** Focus on SEE – What are investors and developers looking for in the region?

2023 has not been the most active year in SEE in terms of transactions but we're constantly seeing new players entering the region. Experts from Slovenia, Croatia, Serbia and Bulgaria will share an update on what's driving investment and development activity in their home markets.

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

Panellists:

Mirta Ceranac Poljak, Managing Director, Croatia, M7 Real Estate

Miloš Grdinić, Director of Development and Asset Management, Delta Real Estate

Uroš Grujić MRICS, Senior Director | Head of Investment Properties SEE, CBRE

Bojan Jevremović, Leasing Director – Office Portfolio, MPC Properties

Matevž Menčak, Head Of Real Estate Funds, Generali Investments Slovenia

15:00 - 16:30 **Panel** Focus on Ukraine – Let's talk about rebuilding in a sustainable way!

Ukrainian businesses are living through their hardest times, but they still keep working and finding solutions that can serve as a foundation for the post-war rebuilding of the country. Our panellists will discuss how this topic can be approached with sustainability in mind.

Chair: **Sergii Stoliarchuk**, Managing Partner Ukraine, Polish-Ukrainian Real Estate Hub

Panellists:

Oleksandr Bondarenko, Managing Partner, Bureau of Investment Programs

Alfred Praus, President, Ukrainian-Austrian Association

Daniel Puchalski, Managing Partner and Co-Founder, Immo Lab

Igor Raikov, Founder & CEO, Spilnota

16:30-17:00 – CLOSING & PROSECCO