

PERE

Europe Summit London 2022



PERE Europe Summit 2022

Featuring 3rd Borrowers & Lenders Forum and 1st ESG & Impact Forum

14-16 June 2021 | Hilton London Tower Bridge, London, UK

Secure allocations. Build relationships. Find investments

Agenda overview

Day	Themes	
Day 1 – 14 th June	Investor Day	
Day 2 – 15 th June	Essential Real Estate	
Day 3 – 16 th June	PERE ESG & Impact Forum	Real Estate Capital Europe Borrowers & Lenders Forum

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2022 speakers

1. Cornel Widmer, Managing Director, Head of Group Real Estate, **Zurich Insurance**
2. Helena Olin, Head of Real Assets, **AP2**
3. Isabelle Scemama, Global Head of AXA IM Alts and Chief Executive Officer of **AXA IM - Real Asset**
4. Tracy Stroh, Managing Director, **GIC Real Estate**
5. Stephen Tross, Chief Investment Officer - International Investments, **Bouwinvest**
6. Joanne McNamara, Executive Vice President, Europe and Asia-Pacific, **Oxford Properties**
7. Andrea Orlandi, Managing Director and Head of Real Estate Investments - Europe, **CPP Investments**
8. Paul Tebbit, CIO for European Real Estate, **BlackRock**
9. Daniel McHugh, Chief Investment Officer, Real Assets, **Aviva Investors**
10. Lee Marshall, Head of Real Estate, **Pension Protection Fund**
11. Jay Kwan, Managing Director, Head of Europe, International Real Estate, **QuadReal Property Group**
12. Martin Towns, Deputy Global Head of Real Estate, **M&G Real Estate**
13. Joseph Ghazal, Chief Investment Officer Europe, **Prologis**
14. Robert-Jan Foortse, Head of European Property Investments, **APG Asset Management**
15. Karim Habra, Head of Europe and Asia-Pacific, **Ivanhoé Cambridge**
16. Jonathan Jay, Partner, **Conduit Real Estate**
17. Laura Craft, Global Strategy & Investment ESG, **Heitman**
18. Roxana Isaiu, Chief Sustainability Officer, **GRESB**
19. Jose Pellicer, Head of Investment Strategy, **M&G Real Estate**
20. Pooja Patel, Managing Director, **StepStone Group**
21. Michela Hancock, Managing Director, Europe, **Greystar**
22. Sophie van Oosterom, Global Head of Real Estate, **Schroders**
23. Derk Welling, Senior Responsible Investment & Governance Manager - Real Estate investments, **APG Asset Management**
24. Andrew Simmons, Managing Director, **Green Street**
25. Sarah Acheson, Investment Director – Real. Estate, **Cambridge Associates**
26. Craig Prosser, Managing Director, Head UK Real Estate Finance, **LBBW**



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27. Ralf Kind, Managing Director, Head of Real Estate Debt, **Edmond de Rothschild REIM**
28. Kylie O'Connor, Global Head of Real Estate, **AMP Capital**
29. Charlotte Jacques, Head of Sustainability and Impact Investment Real Estate, **Schroders Capital**
30. Natalie Howard, Head of Real Estate Debt, **Schroders Capital**
31. Hala El Akl, Senior Director of ESG and Operations, **Oxford Properties Group**
32. Peter Denton, Chief Executive Officer, **Homes England**
33. Caroline Hill, Managing Director, Europe Real Estate ESG, **Blackstone**
34. Mark van de Wiel, Head of CRE Debt Transactions, **NN Investment Partners**
35. Rahul Sule, Co-head, EMEA & APAC CRE Finance & Special situations, **JPMorgan Chase & Co.**
36. Martin Gettings, Head of ESG Europe - Real Estate, **Brookfield**
37. Lorcain Egan, Head of Lending, Europe, **Starwood Capital Group**
38. Anna Shiel, Head of Origination, **Big Society Capital**
39. Stéphane Theuriau, Partner and the Head of BC Partners Real Estate, **BC Partners**
40. Adrian Ion, CFO, **Therme Group**
41. Michael Swank, Senior Managing Director, **Blackstone**
42. Mary Nicholson, Head of Responsible Investment, **Macquarie Asset Management**
43. Maggie Loo, Partner, **Bridges Fund Management**
44. Curth-C. Flatow, Managing Partner, **FAP Group**
45. Simon Chisholm, Chief Investment Officer, **Resonance**
46. Sean Egan, CEO, **Egan-Jones Ratings Company**
47. Shamez Alibhai, Head of Community Housing and Portfolio Manager, **Man Group**
48. Annette Kröger, CEO North & Central Europe, **Allianz Real Estate**
49. **Allianz Real Estate**, speaker TBC
50. **CBRE IM**, speaker TBC
51. Jaime Martinez, Head of Alternative Financing, **Stoneweg**
52. Ljiljana Macdonald, Managing Director, Distribution, **Optimum Asset Management**
53. Garrett Bjorkman, Managing Director, Portfolio Oversight, **CIM Group**
54. Markus Beran, Head of Origination International Investors, **Berlin Hyp**
55. Farrah Brown, Partner, **Knight Frank Capital Advisory**
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59. Basil Demeroutis, Managing Partner, **FORE Partnership**
60. Nunzio Laurenziello, Head of Debt Investments, **Generali Real Estate**
61. Jenny Hammarlund, Managing Director, Head of Europe, **Cadillac Fairview**
62. Bruno Dord, Head of Real Estate Financings - Paris Hub, **Allianz Real Estate**
63. Renaud Haberkorn, Managing Partner - Real Assets, **Eurazeo**
64. Ben Barbanel, Head of Debt Finance, **OakNorth Bank**
65. Catherine Raynsford, Director, **Hyde Group**
66. Dominique Cachelin, Group Treasurer, **GLP Europe**
67. Shaun Dawson, Head of Insights, **DeVono**
68. Steven Gower, Head of Treasury, **Savills Investment Management**
69. Alexandra Ingram, Head of Sustainability, Capital Markets, EMEA, **JLL**



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- 70. Bryan York Colwell, Co-Founder and Managing Partner, **LCN Capital Partners**
- 71. **Cain International**, speaker TBC
- 72. **Cain International**, speaker TBC
- 73. Anuj Mittal, Managing Director, Head of Europe Real Estate, **Angelo Gordon**
- 74. Dorte Rich Joergensen, Associate Principal, **Elementa Consulting**
- 75. Jonathan Jones, Group Property Director, **Meggitt**
- 76. Mark L. Epstein, Chief Financial Officer, **McArthurGlen Group**
- 77. Keith Breslauer, Managing Director & Senior Partner, **Patron Capital**

More speakers TBC

Tuesday 14th June 2022

Investor day

(All delegates welcome to attend)

08:00 **Registration opens and networking breakfast**

9.00 **PERE welcome**

9.15 **View from the commentary box**

Jonathan Brasse, Senior Editor, **PERE**

9.30 **Welcome & chair's opening remarks**

Investor day

9.45 **Europe's institutional investor panel: what does real estate investing look like in the next decade?**

- How are fund investors looking to adjust their allocations in 2022 and beyond?
- Which sectors are investors prioritising and what types are product resonate the most at present?
- What is investors' appetite for specialist vs generalist managers?
- To what extent are inflationary concerns making real estate a more attractive destination for capital?
- How are investors viewing the impact of inflation on their investments and strategy going forward?



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- What is investor appetite for 'alternative' investment types such as SPACs, REITs and proptech funds?

Robert-Jan Foortse, Head of European Property Investments, **APG Asset Management**
Andrea Orlandi, Managing Director and Head of Real Estate Investments - Europe, **CPP Investments**

Lee Marshall, Head of Real Estate, **Pension Protection Fund**

Joanne McNamara, Executive Vice President, Europe and Asia-Pacific, **Oxford Properties**

Helena Olin, Head of Real Assets, **AP2**

10.45 Networking break

11.15 **Morning keynote: Q+A with Bouwinvest: finding returns in a new real estate climate**

- Hear from the CIO of international investments of Bouwinvest, the €14.1 billion specialist Dutch real estate investor
- Discover priorities for indirect real estate exposure in Europe and globally in the coming years
- Learn more on Bouwinvest's evolving investment approach and where they're looking to find risk-adjusted returns
- Understand which sectors, geographies and strategies are resonating most with one of Europe's leading fund investors

Stephen Tross, Chief Investment Officer - International Investments, **Bouwinvest**

11.45 **Europe as an investment destination**

- Hear from global institutional investors give their perspective on Europe as a place to put their capital
- What are the key risks, opportunities and barriers that global investors see when assessing the region?
- How does the region compare to other geographies and markets
- Which sectors and strategies are non-European investors looking to get exposure to?
- What unique opportunities does Europe offer relative to other markets globally?

Tracy Stroh, Managing Director, **GIC Real Estate**

Annette Kröger, CEO North & Central Europe, **Allianz Real Estate**

Jenny Hammarlund, Managing Director, Head of Europe, **Cadillac Fairview**

Jay Kwan, Managing Director, Head of Europe, International Real Estate, **QuadReal Property Group**

Moderated by **Cain International**, speaker TBC



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12.30 Lunch

13.30 **Afternoon keynote: Getting ahead of the curve - a deep dive into AXA's real estate strategy**

Hear from one of the global leaders in real estate – Isabelle Scemama, Global Head of AXA IM Alts and Chief Executive Officer of AXA IM - Real Assets – to hear an in-depth discussion on how the €110bn investor has developed its strategy to stay one step ahead of the pack in a fiercely competitive market.

- How is AXA IM Alts leading the market in new sectors like life sciences while re-inventing established sectors like office?
- As more and more of its real estate investing becomes direct, what does AXA IM look for in its real estate partners?
- How is the concept of flexibility being implemented in repositioning properties in office and other sectors?
- What opportunities are presented by asset obsolescence – and how is AXA IM Alts futureproofing its real estate assets?
- How is ESG being incorporated into its investment, development and repositioning strategies?

Isabelle Scemama, Global Head of AXA IM Alts and Chief Executive Officer of **AXA IM - Real Asset**

Moderated by Evelyn Lee, Editor, **PERE**

14.00 **Climate strategy and the built environment**

- How are assets owners implementing net zero commitments as they pertain to real assets?
- How are appraisers considering climate risk in valuations and transactions?
- How are institutional investors looking to identify, quantify and integrate climate risk into their investment decision making?
- How are climate considerations influencing manager selection and location/sector exposure and acquisitions?
- How are LP implementing their net zero commitments in practice?
- What data are LPs requesting from their managers when it comes to carbon emissions?

Cornel Widmer, Managing Director, Head of Group Real Estate, **Zurich Insurance**

Sophie van Oosterom, Global Head of Real Estate, **Schroders**

Daniel McHugh, Chief Investment Officer, Real Assets, **Aviva Investors**



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14.45 Innovations and emerging opportunities in real estate credit

- What strategies are some of Europe's leading debt funds pursuing?
- How are institutional investors viewing the role of debt with their portfolios in the next 5 years?
- What's new products and innovation are up and coming in the market such as Sale & Lease Backs and Nett Leases?
- What opportunities does debt offer to the portfolio mix that equity investments lack in the new real estate market?
- How are investors looking to gain exposure to the debt market in Europe and globally?

Ralf Kind, Managing Director, Head of Real Estate Debt, **Edmond de Rothschild REIM**
Garett Bjorkman, Managing Director, Portfolio Oversight, **CIM Group**
Bryan York Colwell, Co-Founder and Managing Partner, **LCN Capital Partners**

15.30 Networking break

16.00 Your customers' customer: insight into the real estate needs of occupiers

- How are large corporates looking at their future real estate needs?
- What are the evolving needs of corporate supply chains, and what opportunities does this present to private investors and operators?
- What are the priorities for corporate lease holder when it comes to design, wellbeing and sustainability of buildings?

Shaun Dawson, Head of Insights, **DeVono**
Jonathan Jones, Group Property Director, **Meggitt**

16.45 Chair's closing remarks

17.00 Networking drinks

18.00 End of day one



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Day two – Wednesday 15th June 2022

Essential real estate

8.30 **Registration and networking**

9.30 **Welcome & chair's opening remarks**

Sean Egan, CEO, **Egan-Jones Ratings Company**

9.45 **Overview of leading fund manager strategies**

- To what extent are investors finding it difficult to deploy capital?
- How are managers thinking about inflation?
- What strategies are helping managers to hedge and diversify risk such as mixed-use?
- How are fund managers adapting their investment thinking to meet the needs of the pandemic-hit environment?
- How are investor organising themselves to access 'niche' sectors?
- To what extent are manager pursuing 'contrarian strategies' in retail and offices?

Kylie O'Connor, Global Head of Real Estate, **AMP Capital**

Martin Towns, Deputy Global Head of Real Estate, **M&G Real Estate**

Jolly Singh, Principal, Portfolio Oversight, **CIM Group**

10.45 Networking break

11.15 **Keynote #3**

11.45 **How to scale deployment in the 'new economy' portfolio**

- Data centres, life sciences, residential and other social infrastructure – what's the amount of opportunity in these new economy sectors and their investment capacity?
- What will be the new normal for hospitality demand and how are funds navigating investment in the sector?
- What resources are investors taking on to facilitate effective operational strategies?
- What strategies are investors pursuing to gain exposure in data centres and more broadly the digital economy?
- What are the unique challenges and risks in building an operational model in emerging sectors?



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Michael Swank, Senior Managing Director, **Blackstone**
Adrian Ion, CFO, **Therme Group**
Ljiljana Macdonald, Managing Director, Distribution, **Optimum Asset Management**

12.30 Lunch

13.30 **Deep dive into contrarian strategies: where are value-add and opportunistic managers looking for returns?**

- Accounting for obsolescence risk when pricing assets?
- How are investors viewing opportunities in the hospitality, offices, and retail sectors?
- What have been the lasting impact of the pandemic on demand in the most hard-hit sectors?
- When, or will, distressed opportunities for discounted assets in these sectors emerge?
- To what extent are investors repositioning away from hard hit sectors?
- What types of assets remain attractive in sectors that have been negatively impacted by the pandemic?

Stéphane Theuriau, Partner and the Head of BC Partners Real Estate, **BC Partners**
Anuj Mittal, Managing Director, Head of Europe Real Estate, **Angelo Gordon**
Keith Breslauer, Managing Director & Senior Partner, **Patron Capital**

14.15 **Too hot to ignore: exploring the next phase of logistics and industrial investment**

- What is the landscape of the logistics and industrial market in Europe?
- What is the outlook on capital flows and yield compression for the market?
- What is the outlook on fundamentals of supply-demand and trends in e-commerce in Europe?
- How are investors looking to future-proof their assets?
- What are the prospects for multistorey industrial in the UK?
- How to make value add returns from current land values in industrial?
- What are the economics of value-add development in industrial assets?

Paul Tebbit, CIO, European Real Estate, **BlackRock**
Joseph Ghazal, Chief Investment Officer Europe, **Prologis**

15.00 Networking break

15.30 **Finding opportunities amongst the more nascent sectors**



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- Asset classes that have already ‘crossed over’ to becoming more mainstream and how they’ve performed since
- Asset classes poised for expansion
- Infrastructure-like asset classes – can these offer opportunity for real estate mandates?

Andrew Simmons, Managing Director, **Green Street**

15.50 **Building platforms: How to create value through an operational strategy**

- How are different investors taking on operational risk and looking to gain critical mass in alternative markets?
- How are investors calculating the optimal value balance between operational excellence and the added cost incurred?
- What are the lessons learnt in working with operating partners?
- How are investors deciding when to integrate operational management and when to outsource?

Michela Hancock, Managing Director, Europe, **Greystar**
Karim Habra, Head of Europe and Asia-Pacific, **Ivanhoé Cambridge**
Renaud Haberkorn, Managing Partner - Real Assets, **Eurazeo**

16.40 **Chair’s closing remarks**

17.00 **End of day two**



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Day Three – Thursday 16th June 2022

Real Estate Capital Europe Borrowers & Lenders Forum

8.00 **Registration and networking**

9.00 **Welcome & chair's opening remarks**

9.05 **Outlook of the real estate debt and finance market in Europe**

- What will be the impact of inflation and rising interest rates on the real estate finance market in the coming 2-3 years?
- What have been the most notable deals taking place in the market in the last year?
- How liquid are emerging sectors within the European market?
- What are the expectations on the levels of distressed debt in the market in the coming few years?
- How are banks' real estate lending strategies in Europe changing and what will be the impact on alternative lenders?
- Looking back at the 'pandemic era' – what have been the main lessons learnt for lenders and borrowers?

Craig Prosser, Managing Director, Head UK Real Estate Finance, **LBBW**

Natalie Howard, Head of Real Estate Debt, **Schroders Capital**

Curth-C. Flatow, Managing Partner, **FAP Group**

Jaime Martinez, Head of Alternative Financing, **Stoneweg**

9.50 **Large loan syndications in Europe**

- What are the challenges faced by underwriters in large loan deals?
- What is borrowers' preference for clubs relative to one bank financing solutions?
- Liquidity sources for real estate debt

Nicola Free, Managing Director, Head of CRE, EMEA, **Wells Fargo Bank**

Mark van de Wiel, Head of CRE Debt Transactions, **NN Investment Partners**

Bruno Dord, Head of Real Estate Financings - Paris Hub, **Allianz Real Estate**

10.30 **Keynote Q+A: a leading borrower's view of the real estate finance market**



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11.00 Networking break

11.30 Borrowers' perspectives on the current financing climate

- To what extent are borrowers now comfortable with borrowing from non-bank lenders?
- How are borrowers looking to raise capital in 2022 and beyond?
- How are borrowers evaluating and diversifying different sources of finance?
- What are the main challenges in accessing finance from a borrower's point of view?
- How are borrower's finding responding to ESG data requests?

Nunzio Laurenziello, Head of Debt Investments, **Generali Real Estate**

Dominique Cachelin, Group Treasurer, **GLP Europe**

Steven Gower, Head of Treasury, **Savills Investment Management**

Mark L. Epstein, Chief Financial Officer, **McArthurGlen Group**

12.15 Lending to 'hard-hit' sectors: retail hospitality and secondary offices

- At what price do more risky sectors become attractive to lenders?
- How have lending volumes to 'embattled' real estate sectors fared over the covid period?
- To what extent is retail activity bounced back?
- How are lenders vetting opportunities in traditional sectors and have there been significant adjustments to their risk appetite/underwriting?

Jonathan Jay, Partner, **Conduit Real Estate**

Rahul Sule, Co-head, EMEA & APAC CRE Finance & Special situations, **JPMorgan Chase & Co.**

Ben Barbanel, Head of Debt Finance, **OakNorth Bank**

13.00 Lunch

14.00 How are lenders accessing opportunities in emerging sectors?

- How liquid are the 'hot' sectors such as single-family rentals, healthcare and content creation?
- How are lenders going about gaining exposure to alternative asset types?
- What are the main challenges in underwriting deals in life sciences, data centres and residential?

Lorcain Egan, Head of Lending, Europe, **Starwood Capital Group**

Philippe Deloffre, Managing Director, Real Estate, Head of European Debt Origination, **Intermediate Capital Group**



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Cain International, speaker TBC

14.45 **Sustainability-linked loans: how are lenders incentivising impact and ESG in their portfolio?**

- Is the cost of financing increasing for unsustainable projects or assets?
- How significant is the data burden that comes with sustainability performance measurement and reporting for borrowers?
- What are the main challenges are faced by lenders in creating credible EST-orientated incentives to their borrowers?
- What are some of the more innovative models being applied in the market to engage borrowers?

Markus Beran, Head of Origination International Investors, **Berlin Hyp**
Farrah Brown, Partner, **Knight Frank Capital Advisory**

15.30 Networking break

16.00 **Innovation and digitalisation in real estate lending**

- Where can AI help to streamline lending practices and risk management?
- What cost efficiencies does automation in real estate lending?
- How can tech and innovation be utilised for more effective portfolio management?

16.45 **Closing remarks**

17.00 **End of conference**



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Day three - Thursday 16th June 2022

PERE ESG & Impact Forum

9.00 **Welcome & chair's opening remarks**

9.05 **Fund investors' perspectives on real estate sustainability**

- What information demands are fund investors making on their real estate fund managers when it comes to sustainability?
- Does investors' drive to clean their portfolios mean inefficient and currently unsustainable assets are jettisoned rather than 'greened'?
- How high is sustainability on the agenda for different types of institutional investors?

Derk Welling, Senior Responsible Investment & Governance Manager - Real Estate investments, **APG Asset Management**
Pooja Patel, Managing Director, **StepStone Group**

9.45 **Leveraging ESG for value creation in real estate**

- How can the influence of ESG in investment decision-making and asset management be maximised?
- What are the risks of ignoring a robust ESG effort?
- What examples do we have where ESG performance lead to higher valuation or yields?
- How are funds going about engaging tenants on sustainability and just how crucial is this as an aspect of ESG performance?
- How can funds plan a cost-efficient transition at the portfolio-level?

Jose Pellicer, Head of Investment Strategy, **M&G Real Estate**
Laura Craft, Global Strategy & Investment ESG, **Heitman**
Caroline Hill, Managing Director, Europe Real Estate ESG, **Blackstone**
Allianz Real Estate, speaker TBC

10.30 **Overview of regulatory developments and the implications for real estate**

- How can you create value out of SFDR and EU taxonomy as an investor?
- What are the most notable upcoming regulations across key jurisdictions such as the FCA and EU?
- Discover where the key legal risks are when making impact claims and how efforts to stamp-out impact washing will evolve

Roxana Isaiu, Chief Sustainability Officer, **GRESB**



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11.00 Networking break

11.30 Real estate impact investments: an overview of opportunities, funds and innovations

- How much appetite is there from impact allocators for real estate orientated product?
- What are the main considerations when launching an impact offering or product?
- To what extent should 'impact investment' thinking be integrated into mainstream investments?
- To what extent are returns concessionary?

Charlie Jacques, Head of Sustainability and Impact Investment, Real Estate, **Schroders Capital**

Maggie Loo, Partner, **Bridges Fund Management**

Simon Chisholm, Chief Investment Officer, **Resonance**

12.15 Creating an affordable housing investment strategy

- What are the best examples of affordable housing models around the world that have taken off?
- How crucial is collaboration with local and national government– and what the lessons learnt in engaging public institutions and bodies?
- How is 'affordability' calculated?
- How do investors that are looking to maximise returns balancing this with the need for 'affordable', below-market-rate rents?

Peter Denton, Chief Executive Officer, **Homes England**

Shamez Alibhai, Head of Community Housing and Portfolio Manager, **Man Group**

Catherine Raynsford, Director, **Hyde Group**

13.00 Networking lunch

14.00 Applying wellness as a value add to real estate assets

- What does the concept of 'wellness' mean in a real estate context?
- How is wellness calculated and to what extent does it add a premium to rents and tenet satisfaction?
- What example exist of buildings that have high 'wellness' ratings?
- How can the concept best be applied in different sectors?

Adrian Ion, CFO, **Therme Group**



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14.45 **Going beyond a commitment: what does a net-zero real estate strategy mean in practice?**

- How are managers measuring the carbon footprint from your existing portfolio?
- What are the main barriers being encountered on the net-zero pathway?
- How to reduce your energy usage in buildings via technology solutions?
- What are the leading frameworks which funds can use to build a climate strategy around?

Hala El Akl, Senior Director of ESG and Operations, **Oxford Properties Group**
Alexandra Ingram, Head of Sustainability, Capital Markets, EMEA, **JLL**

Moderated by Mary Nicholson, Head of Responsible Investment, **Macquarie Asset Management**

15.30 Networking break

16.00 **To rebuild or upgrade: calculating embodied carbon in real estate assets**

- To what extent should buildings be upgraded rather than built from scratch – what the carbon cost of new buildings relative to building upgrades?
- What are the extra capex requirements in making buildings green?
- What policies and practices can be applied to minimise 'embodied carbon' during construction?
- How are investors attempting to increase the sustainability of existing stock?

Martin Gettings, Head of ESG Europe - Real Estate, **Brookfield**
Basil Demeroutis, Managing Partner, **FORE Partnership**
Dorte Rich Joergensen, Associate Principal, **Elementa Consulting**

16.45 **Closing remarks and end of conference**



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