

Europe Forum

10 June 2025

Tuesday – Day 1

0830 Registration and networking breakfast

0830 Breakfast briefing: Investor Council (*Invitation only, RSVP required*)

- PERE data presentation on investor allocation, geographies, strategies and asset appetites
- Investor sentiment in the current market landscape – market and political headwinds are increasingly of concern to investors

0915 Welcome remarks

0930 Keynote interview: Border to Coast and the right time to buy

- The UK Real Estate Fund launched last year with a focus on industrial and logistics—what's next?
- Plans to diversify into residential and life sciences—what's the investment thesis?
- The shift from indirect to direct investment—how will this change cost structures and efficiency?

Alistair Smith, Head of Real Estate, **Border to Coast Pension Partnership**

1000 Keynote panel: Bringing investors back to the table in the new cycle

- Navigating geopolitical risk, recession fears, and trade impacts from the Trump administration, managers turn to value-add and core-plus strategies to meet investor demand
- Asset classes such as data centers, life sciences, and healthcare assets are attracting institutional capital – how do they fit into the wider real estate portfolio?
- How AI-driven underwriting and predictive analytics are accelerating transactions and reshaping portfolio strategies

1045 Networking coffee break

1115 Redesigning a real estate portfolio faced with market uncertainty

For program information:
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- How has Ivanhoé Cambridge (CDPQ) adapted it's global and long-term strategy in a world full of uncertainty such as economic turmoil, climate change and the return of "borders" in the global markets?
- Understand how alternative assets such as student housing, self-storage, data centers and life sciences fit into their modern real estate portfolio
- Utilising tactics such as capital recycling to support the growth of real estate portfolio

Rana Ghorayeb, Executive Vice President and Head of Real Estate, **Ivanhoé Cambridge (CDPQ)**

1145 Sectors spotlight – opportunities in the next cycle of real estate investment

- How do traditional "sheds and beds" fit into today's investment landscape amid growing interest in alternative sectors?
- Exploring how investors are capitalizing on redesigned retail spaces.
- With office values resetting, is the asset class making a comeback?

1230 Networking lunch

| Equity Track | Debt Track |
|--|--|
| <p>1330 European real estate: on the road to recovery?</p> <ul style="list-style-type: none"> • How is investor sentiment evolving across the European and UK markets? • How will the consolidation of Local Government Pension Schemes (LGPS) affect real estate commitments? • Despite many 2024 funds missing targets, momentum is improving—what's the outlook for funds currently in the market? <p>Erik Vikbladh, Chief Investment Officer, AREIM</p> <p>1415 Investor panel: Strategies for long-term value creation</p> <ul style="list-style-type: none"> • How are investors balancing core, value-add, and opportunistic real estate investments to optimize risk-adjusted returns | <p>1330 Keynote interview: The state of play for real estate debt</p> <ul style="list-style-type: none"> • How are interest rates, inflation, and capital markets volatility reshaping real estate debt strategies? • Where are institutional investors and fund managers deploying capital across private credit, structured debt, and opportunistic financing? • How are fund structures adapting to changing investor demands, and what innovative financing solutions are emerging in today's market? <p>1415 Keynote panel: what's next for real estate debt?</p> <ul style="list-style-type: none"> • How are debt funds overcoming fundraising challenges and attracting institutional capital? |

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- Navigating macroeconomic shifts and interest rate fluctuations shaping institutional real estate investments
- Exploring co-investments, joint ventures, and secondaries to enhance returns that align with investor objectives

Jenny Hammarlund, Senior Managing Director, **OTPP**

Jay Kwan, Managing Director, Head of Europe, **QuadReal**

1500 Networking coffee break

1530 Unlocking liquidity & scaling investments

- How are real estate players using secondaries, GP-led recapitalizations, and co-investments to create liquidity and optimize portfolios?
- Investors are shifting toward JVs and platform investments to gain better control, alignment, and scalability
- Weighing the trade-offs between single-asset deals and long-term platform structures

1615 Keynote interview: Adapting to a new investment landscape

- What trends are shaping cross-border capital flows and regional investment strategies?
- How are managers overcoming investor hesitancy, structuring deals, and navigating the evolving GP-LP dynamic?
- How investor strategies are changing amidst market volatility, repricing and net-zero targets

- With banks retreating, where are alternative investors stepping in to fill the financing gap?
- How will recapitalizations and refinancings drive capital movement in the next 12-18 months?

David Gorleku, Managing Director, Real Estate, **Blackstone**

Alberto Agazzi, Head of GRE, **Generali Real Estate**

1500 Networking coffee break

1530 Institutional perspectives on global real estate credit

- How are institutional investors adjusting their real estate debt allocations in response to market volatility?
- How do European credit opportunities compare to the U.S. and other global markets?
- What key factors are driving manager selection, risk appetite, and return expectations?

Jonathan Campbell, Head of Real Estate Credit, **The Phoenix Group**

Laurine Amiel, Investment Director, **Australian Super**

Jonathan Jay, Managing Partner, **Conduit RE**

1615 Real estate debt roundtables

- The rise of private credit lenders and how they are reshaping project financing to be more inflation-resistant
- Opportunities in asset classes such as data centres and industrial, as well as

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1700 Networking drinks

risks in more distressed assets such as office

1700 Networking drinks

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Wednesday – Equity & Debt

Equity Track

0845 Registration and networking breakfast

0900 Welcome remarks

0915 Navigating the next phase of growth for logistics investment

- What impact will new regulations, energy costs, and geopolitical risk have on investment decisions across European and global logistics markets
- Tenant demands for automation, ESG compliance, and nearshoring are reshaping logistics asset requirements
- How emerging sub-sectors such as cold storage, last-mile facilities, and multi-level warehouses are performing – do they offer long term scalability?

1000 Operational real estate

- Why investors are increasingly targeting healthcare in 2025.
- European hospitality investment is surging—should the sector now be considered a core asset class?
- With student populations rising and supply constrained in key markets like

Sustainability Track

0845 Registration and networking breakfast

0900 Welcome remarks

0915 The future of sustainable real estate – balancing responsibility, regulation and returns

- How are institutional investors aligning ESG, decarbonisation, and impact mandates with financial performance?
- How are evolving global and European regulations influencing sustainability strategies across portfolios?
- How ESG performance is becoming a key differentiator in access to capital, investor partnerships, and long-term value creation

Bertrand Absolut, Senior Advisor, Sustainability, **Ivanhoé Cambridge (CDPQ)**
Diana Louis, Head of Alternative Assets ESG Integration, **MEAG**

1000 Impact investment – where purpose meets performance

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the UK, where are the best opportunities for investors?

Chad Buchanan, Founder and Managing Partner,
Twin Light Capital

1045 Networking coffee break

1115 Scaling up data centres to meet increasing demand

- Examining the mature markets and where to look next - are secondary markets viable options for deployment?
- How GPs are navigating scalability and supply challenges such as power limitations, land scarcity and permitting delays
- With increasing scrutiny on energy consumption, how can investors future-proof assets while meeting sustainability targets?

1200 Networking lunch and conference end

- How investors are integrating measurable impact mandates while ensuring strong financial performance
- How carbon reduction goals and social impact investments, such as affordable housing, are being structured for institutional capital
- How Europe and the UK can attract larger allocations to impact-driven real estate funds

1045 Networking coffee break

1115 The role of decarbonisation in value creation

- With evolving European & UK regulations, how are investors ensuring compliance while staying competitive?
- What are the most effective strategies for reducing embodied carbon and achieving net-zero portfolios?
- How are institutional investors financing the green transition, from green bonds to sustainability-linked loans?

1200 Financing the Green Transition

- How green bonds, sustainability-linked loans, and impact funds are reshaping real estate capital markets
- How ESG-linked financing terms and investor scrutiny are driving manager behavior and fund structures
- How institutional investors are embedding sustainability criteria into debt and equity financing decisions

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