

# PERE Europe Forum

**PERE Europe Forum 2026**  
**Convene 22 Bishopsgate, 15 - 16 September**

*PERE Europe returns to London once again in 2026, this time with a greater focus on the real assets convergence, the rise of private wealth, the explosion of GP-led secondaries and a strong focus on the most attractive sectors to real estate investors today.*

*As real estate bounces back from years of fundraising difficulties, connect with 200+ senior investment leaders from leading European investors and global fund managers.*

## Day 1: 15<sup>th</sup> September

### 8.00 Registration opens

### 8.30 Welcome from PERE

Evelyn Lee, Editor, **PERE**

### 8.40 Welcome from the Chair

**Stéphanie Bensimon**, Member of the Executive Committee, Member of the board of Ardian France & Head of Real Estate, **Ardian**

### 8.45 Keynote address

*Where are we in the big picture? The outside perspective. Wei Li, Global Chief Investment Strategist at BlackRock, shares her expert perspective on the forces impacting the world's capital markets right now, the private sectors institutional, retail and insurance capital currently favour and where private real estate sits within that mix.*

Moderator: Jonathan Brasse, Editor-in-Chief, **PERE**

Speaker: Wei Li, Global Chief Investment Strategist, **BlackRock**

### 9.15 Manager panel: Stress testing the real estate rebound

- As real estate fundraising begins to gather pace once again, how are managers building resilience to geopolitical and economic headwinds?
- Which regions, sectors and investment strategies are most attractive today?
- How are managers bringing real estate to new investors in private wealth and insurance?

Moderator: Jonathan Brasse, Editor-in-Chief, **PERE**

Speakers:

Donato Saponara, Head of South & West Europe & Co-Head of Investments Europe, **PIMCO Prime Real Estate**

Nael Mustafa, CEO, **GFH Partners**

Stephanie Hacking, Portfolio Fund Manager, **Royal London Asset Management**

Axel Karlsson, CEO, **NIAM**

**9.55 Investor panel: Redefining real estate allocation strategies**

- How are economic and geopolitical factors impacting global and regional allocation strategies?
- How are investors building and managing portfolios for greater returns?
- Given the surge of private wealth into private markets, how are LPs viewing GP relationships today?

Moderator: Charlotte D'Souza, Editor, Equity, **PERE**

Speakers:

Anne Koeman-Sharapova, Head of Europe Real Estate Investment, **Mercer**

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

Alex Turner, Head of Property, **USS**

Mathieu Elshout, Head of International / European Property, **Aware Super**

Wincel Kaufmann, Sustainability Lead, Real Estate, **Zurich**

**10.35 Fireside chat: Europe as the destination for capital deployment**

- How has a shift away from the US been beneficial for the European investment outlook?
- Which sectors, such as retail, logistics and hospitality, are attractive to investors?
- What might the European investment outlook be like in the next decade?

Moderator: Evelyn Lee, Senior Editor, **PERE**

Speakers:

Alex Knapp, Global Head of Real Estate, **Norges Bank**

**11.00 Morning networking & coffee break**

**11.30 Panel: The future of residential and living**

- How are shifts in demographics, regulations, affordability and lifestyle driving demand for the residential and living sector?
- The role of technologies, such as AI, in driving operational efficiencies and creating more value for investors
- What ESG, sustainability and decarbonization efforts are being prioritised?

Moderator: Andreas Rothacher, Head of Investment Research, **Complementa AG**

Speakers:

Nick Sissling, Director, Investments Europe, **Oxford Properties Group**

Anssi Halonen, Head of Acquisitions in the European Real Estate group, **Carlyle**

Henrik Orrbeck, Co-Head of Private Real Estate, **Partners Group**

Matteo Minardi, Co-Head of Real Estate Investment, **Ardian**

**12.10 Panel: Realising the next industrial and logistics life cycle**

- With industrial and logistics remaining one of the most resilient sectors, which regions and sub-sectors are most compelling today?

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- How are geopolitical and supply chain risks accelerating nearshoring and reshoring across Europe?
- What impact is increased European defence spending having on demand, development and location strategy?

Moderator: Sarah Marx, Senior Reporter, **PERE Deals**

Speakers:

Joshua Adams, Partner, **OpenGate Capital**

Thomas Blangy, Senior Vice President, **QuadReal**

John Toukatly, Partner, **EQT Real Estate**

Christian Jamison, Managing Partner and Chief Executive Officer, **Valor Real Estate Partners LLP**

Maarten Frouws, Director, European Real Estate, **Fidelity International**

## 12.50 Lunch & LPs in Real Assets Lunch (invite only)

### 13.50 Panel: AI in Real Estate – Turning Your Investment Edge into Agentic Memory

- Where is AI creating real value across the real estate investment lifecycle: from sourcing and underwriting to asset management and portfolio monitoring?
- How can AI move beyond a copilot to become an institutional memory layer?
- How should real estate investors build their AI capabilities? what should be proprietary, what should be leveraged from existing AI infrastructure, and where will AI create a lasting competitive advantage?

Moderator: **Hyun Hong**, CEO, **Terminal X**

Speakers:

- **John Bae**, Portfolio Manager, European Real Estate, **DWS Group / Deutsche Asset Management**
- **William Chung**, Portfolio Manager, **Allianz**

### 14.20 Panel: Operational real estate – generating returns in a hybrid world

- Which sectors are delivering the best returns today?
- Explore key themes such as the blurring of hospitality and living, the rise of hybrid work and blended travel, global travel trends and how this impacts the hospitality sector
- What is the outlook for student, senior, co-living and multi-gen housing?

Moderator: Silvia Saccardi, Senior Reporter, **PERE**

Speakers:

Cecile Babcock, Principal Advisor, Global Investment, **Sustainable Real Estate Forum**

Jacob Loftus, Founder and CEO, **General Projects**

Jill Ju, Founder and CEO, **True North Management**

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

## 15.00 Presentation: Deployment unpacked

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*PERE's deals editor Seb Shehadi presents our 2026 institutional vehicle-led investment data by region, sectors and other metrics critical for a contemporary understanding of market conditions.*

Speaker: Seb Shehadi, Editor, Deals, **PERE**

## 15.25 Afternoon networking & coffee break

### Real Assets Plenary

*After coffee the audience will join together for the real assets plenary – covering the convergence of real estate and infrastructure teams under unified teams and how their strategies develop because of this.*

#### 16.00 Panel: Investors and the real assets convergence

- What's driving organisations to merge real estate and infrastructure teams and is this the new model for institutional portfolios?
- How can unified real assets teams improve allocation, risk management and cross-asset decision making compared to siloed structures?
- Approaches to manager selection, governance, sustainability, technology and the balance between real estate and infrastructure exposure

Moderator: Joe Marsh, EMEA Editor, Investors, **PEI Group**

Speakers:

Alex Bretz, Senior Investment Director, **AustralianSuper**

Robbert Staal, Senior Portfolio Manager, Global Real Estate, **MN**

Marija Simpraga, Co-Head of Real Assets, **People's Partnership**

Jessica Rovet, Investment Associate, **The Crown Estate**

#### 16:40 Panel: The investor & manager real assets partnership

- How are investors balancing real estate, infrastructure and adjacent strategies against other private and public market exposures?
- Where do real assets sit in delivering income, inflation protection and diversification today?
- What does real asset convergence mean for manager relationships, mandate design and long-term allocation strategy?

Moderator: Louisa Yeoman, Founding Partner, **Astrid Advisors**

Speakers:

Anne Kuleshova, Senior Investment Director, Real Assets, **Cambridge Associates**

Amarik Ubhi, Senior Portfolio Manager - Real Assets, **Border to Coast Pensions Partnership**

Nicole Grützmacher, Co-Head of Private Markets, **FERI AG**

Surinder Toor, Managing Partner, **Arjun Infrastructure Partners**

Kunal Koya, Partner, Head of Active Core Infrastructure Europe, **EQT**

#### 17.20 End of day 1 and networking drinks reception

**Day 2: 16<sup>th</sup> September**

**8.30 Registration opens**

**9.15 Chair's welcome back**

Rocco Fioretti, Senior Vice President, **Threadmark**

**9.20 Panel: The future of real estate value creation**

- How is value creation evolving as real estate shifts towards operational uplift, platform capability and targeted capex
- Where the strongest opportunities lie across sectors, from living and logistics to hospitality and alternative real estate
- Insights on the impact of different value-creation levers, including repositioning, ESG upgrades, technology and operator partnerships

Moderator: Sarah Marx, Senior Reporter, **PERE Deals**

Speakers:

Nadiah Hamid, Head of Investments & Acquisitions, Real Estate, **KWAP**

Brian Seaman, Head of Real Estate Equity, **New York Life Investment Management**

Joseph de Leo, Managing Partner and Investment Committee Member, **Benson Elliot**

Christina Forrest, Managing Director, Real Estate, Europe, **La Caisse**

**10.00 Fireside chat:** In conversation with Matt Day, Assistant Director, Equity and Partnerships Origination, **National Housing Bank**

*Matt Day will offer a candid perspective on where European real estate stands in the global capital landscape. His fireside chat will explore where investors are finding opportunity, which sectors are drawing capital and what could shape the region's investment outlook over the next decade.*

Moderator: Lucy Scott, Senior Writer, Credit, **PERE**

**10.20 Credit panel: Refinancing and the rise of private lenders**

- Explore European market dynamics and the impact on global real estate credit
- Will back leverage become the market standard for financing real estate?
- What solutions are being explored to help borrowers navigate the refinancing crunch?

Moderator: Chris Patton, Regional Head of Funds, Europe, **CSC**

Speakers:

Shiraz Jiwa, Founder and CEO, **The Valesco Group**

Justin Faiz, CEO and Co-Founder, **Pluto Finance**

Laia Massague, Partner, **StepStone**

Jonathan Jay, Founder and Managing Partner, **ConduitRE**

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## 11.00 Presentation: Market Update from PERE

Hear from PEI Group's industry leading real estate research group, presenting findings from several peer-to-peer surveys on fundraising, allocation and other key trends.

**Speaker: Kavinder Tack**, Senior Research Associate, **PEI Group**

## 11.20 Morning networking & coffee break

## 11.50 Panel: Europe's REITs in flux: key lessons and actions for private real estate

- Flyers and laggards: which public REITs are outperforming and why
- Dwindling discounts: how long does the privatization opportunity have left?
- Together stronger: stress testing the thesis behind combining public and private exposures in institutional real estate allocations
- Private plays: what it means when more public REITs are raising capital privately

Moderator: Jack Sidders, Team Leader, Real Estate & Investing, **Bloomberg**

Speakers:

Jennifer Stillman, Investment Director, Real Estate, **Aberdeen Investments**

Matthew Fletcher, Investor Outreach Director, **EPRA**

Harm Meijer, Founding Partner, **ICAMAP Advisory**

Matthew Norris, Managing Director of Real Estate Securities, Fund Manager, **Gravis**

## 12.30 Panel: Private wealth and real estate: strategies and partnerships in the next cycle

- How family offices and GP wealth teams are approaching real estate from direct deals and co-investment to curated products designed for private wealth
- Where does private capital see the strongest opportunities across real estate sectors?
- How do private wealth and GP relationships differ to that of institutional LP-GP ones?

Moderator: Sophie Brown, Head of Capital Relationships, **Capital Assured**

Speakers:

Julian Marwitz, Principal, **Marwitz Family Office**

Aida Feriz, Executive Director, **Wimmer Financial**

Ulf Brackmann, CEO, **iKapital.eu**

## 13.10 Networking Lunch Break & Women in Real Assets Circle Lunch

### Real Assets Plenary

*Once again the audiences rejoin for a deeper dive into the real assets world – starting with a lively debate on the for and against of joining up real assets teams, followed by sector specific panels.*

**14.15 Real asset presentation: The innovation halo: Scaling a 4 million sq ft R&D ecosystem**

**Speaker:** Ned Williams, Managing Director, **Evans Randall Investors**

**14.35 Data centres: the new backbone of real assets**

- How investors are approaching data centres as a real assets strategy, including the convergence of real estate and digital infrastructure, the rise of hyperscale demand and operational intensity?
- Where key risks and opportunities lie, from power-constrained markets and AI-driven demand to land scarcity, grid access, sustainability requirements and evolving tenant demands
- What capabilities and platforms are needed to succeed and how can real assets teams leverage cross-aisle expertise in energy, development and operations to create value?

**Moderator:** Oliver Loveless, Principal, **Analysys Mason**

**Speakers:**

- Siobhán Nagle, Managing Director, **Digital Infrastructure EMEA**
- Nic Firzli, Executive Director, **World Pensions Council**
- David Emes, Head of Infrastructure Capital Raising, **L&G**
- David Bloom, Chairman, **Kao Data**

**15.15 End of conference & coffee to go**