

PEI PERE Europe Forum

PERE Europe Forum 2026 Convene 22 Bishopgate, 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: 15th September

8.00 Registration opens

9.00 Welcome from PERE

Evelyn Lee, Editor, **PERE**

9.05 Welcome from the Chair

9.10 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**

Position for 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:

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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, Senior Portfolio Manager Property, **Aware Super**

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, 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, Head of Real Estate Italy & Managing Director, **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?
- 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, Reporter, **PERE Deals**

Speakers:

Joshua Adams, Partner, Head of Europe, **OpenGate Capital**

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

Matthew Brodnik, Partner, Global Chief Investment Officer, **EQT Real Estate**

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

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

13.50 Case study

Reserved for Terminal X

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:

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**

Position reserved for Generali

15.00 Panel: Advancing the frontier of European data centres

- How are real estate investors positioning themselves in the fast-growing data centres sector?
- Where do the best opportunities lie in European primary and secondary markets?
- What capabilities and partnerships are essential to be successful?

Moderator

Speakers:

Jennifer Stillman, Investment Director, Real Assets, **Aberdeen Investment**

15.40 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.

16.10 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

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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**

16:50 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**

17.30 End of day 1 and networking drinks reception

Day 2: 16th September

8.30 Registration opens

9.15 Chair's welcome back

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, 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**

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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**

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:

Duncan Parvin, Managing Director European Origination, **Wells Fargo**

Ben Bianchi, Partner and Global Co-Head of Investments, **Stepstone Group Real Estate**

Panel position reserved for Valesco Group

Panel position reserved for PGIM

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.

11.20 Morning networking & coffee break

11.50 Panel: How and why specialist sector and format approaches are driving today's private real estate capital markets

- The growing appetite for engaging private real estate via secondaries and recaps
- How public REITs are demonstrating a competitive edge via specialist private funds
- Game of operation: why vertically integrated investments and operating platforms are vital for driving alpha

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

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**

13.10 Networking Lunch Break & Women in Real Assets Circle Lunch

13.15 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 Debate: Unification or specialisation?

Join your peers for an on-stage debate featuring LPs and GPs as they debate:

- **The case for convergence:** how unified real assets teams unlock cross-asset insights, improve capital allocation and align more naturally with multi-asset GP platforms
Versus
- **The case for specialist silos:** how dedicated real estate and infrastructure teams deliver deeper expertise, sharper underwriting and stronger governance as assets become more operational and complex

Speakers:

Elisabetta Leoni, Senior Investment Director, **AustralianSuper**

15.15 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?

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**

15.50 End of conference & coffee to go