

# Europe Forum

10 June 2025

Tuesday – Day 1, Equity, Decarbonisation & AI

**0800 Registration and networking breakfast**

**0845 Breakfast briefing: Investor Council (*Invitation only, RSVP required*)**

- PERE data presentation
- Investor sentiment in the current market landscape
- Working with LPACs

**0945 Welcome remarks**

**0950 The PERE commentary box: Two decades of real estate investing**

**1000 Keynote interview: New cycle, next generation**

*Join Border to Coast's Head of Real Estate Alistair Smith as he discusses key trends in real estate as we move into a new cycle, as well as how the public pension fund's real estate strategy is developing.*

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

**1030 Keynote manager panel: New cycle, next generation**

- A look back on biggest deals in the past 20 years and how it affected investing trends
- The next decade – de-globalization, geopolitics, macroeconomics, and world events impacting capital allocation
- A keen look at new burgeoning strategies, alternative capital sources and new tech
- How did sustainability regulations transform the asset class?

**1115 Networking coffee break**

**1145 Keynote investor panel: New cycle, next generation**

- How are investors capitalising on emerging opportunities and driving value creation across their real estate portfolios
- How are deals getting done? What challenges and opportunities face investors in today's climate?

For program information:  
**Ben Moss**  
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- What will the real estate portfolio of tomorrow look like? How does that compare to years gone by?

Jenny Hammarlund, Senior Managing Director, **OTPP**  
Jay Kwan, Managing Director, Head of Europe, **QuadReal**

## 1230 **Manager panel: A new dawn for European real estate**

- Key factors that make Europe a lucrative market for investors
- What does the region offer? Which sectors provide significant growth opportunities?
- What are some compliance-resilience strategies that managers can employ?

Erik Vikbladh, Chief Investment Officer, **AREIM**

## 1315 **Networking lunch & sustainability roundtable (open to all)**

## 1430 **Investor fireside chat**

## 1500 **Panel: Decarbonising real estate – where are we, really?**

- How can investors keep up with evolving environmental standards
- Brown to green transformation strategies
- A keen look at energy efficiency as a key to decarbonisation
- New building technology, the use of big data and artificial intelligence in converting stranded assets

Bertrand Absolut, Senior Advisor, Sustainability, **Ivanhoé Cambridge (CDPQ)**

## 1545 **Networking break**

## 1615 **Investor panel: global investor perspectives on the European real estate market**

- How do global investors view the European real estate market? What countries and sectors are attractive to them?
- What will make investors come back to the table and invest in the region?
- How are investors choosing partners for investments and operational capabilities

## 1700 **Closing keynote**

## 1730 **Networking drinks**

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# Europe Forum

11 June 2025

Wednesday – Day 2, Real Estate Debt & Sectors

**0800 Registration and networking breakfast**

**0830 Breakfast briefing: Real estate debt (*Invitation only, RSVP required*)**

- Real Estate Capital & PEI data presentation
- Debt market outlook
- Deal financing deep dive & discussion

**0945 Day 2 opening and welcome remarks**

**1000 Keynote interview**

**1030 Keynote panel: what's next for real estate debt?**

- Understanding trends and identifying credit opportunities in North America – is the US always a safe haven for capital?
- Fundraising challenges in a volatile environment and finding the most attractive deals in a competitive landscape
- What long-term prospects face real estate debt investors?
- How are banks and non-banks collaborating and competing on real estate?

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

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

**1115 Finding opportunities in global credit markets**

- How are European players adapting to a high-interest rate environment?
- Identify opportunities in a downturn and a look at risks in credit evaluation
- How does the European market compare to the US? How might the Trump administration impact cross-border deals?
- How hard is it to raise capital right now? Where are managers raising capital from?

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

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

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

**1200 Real estate debt fireside chat**

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**PERE**  
Network



# Europe Forum

**1230 Networking lunch**

**1400 Panel: Sector spotlight – opportunities in the next cycle of real estate investment**

- What sectors are the most attractive, is it just sheds and beds?
- How serious should investors consider retail given its transformation in recent years?
- What countries are investors considering and how might geopolitical events and trends impact these deals?

**1445 Panel: Exploring “niche” asset classes”**

- Rent and valuation growth potential in developed, tier-one markets for data centres?
- How attractive are sectors such as senior care, student housing and others in the new market cycle?
- What are the growth opportunities and limitations to these assets?

Chad Buchanan, Founder and Managing Partner, **Twin Light Capital**

**1530 Conference end**

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**PEI**