



**BUILDING
COMMUNITIES**



**INSPIRING
INNOVATION**



24-25 April 2017

ICSC European Conference

Event Guide

Hilton Warsaw Hotel and
Convention Center, Poland



**FUELLING
ECONOMIES**

In association with:



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POLISH COUNCIL
OF SHOPPING CENTRES

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Programme

MONDAY, 24 APRIL 2017

11:00 REGISTRATION OPENS Retail Innovation and Design Trends

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12:00 NETWORKING LUNCH

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13:00 European Conference Welcome



Bill Kistler
Executive Vice President &
Managing Director – EMEA
ICSC



Patrick Delcol
President, PRCH and
Chief Executive Officer –
Central & Eastern Europe
BNP Paribas Real Estate



Conference Moderator:
Mark Dailey
Partner
Madano

13:15 Keynote: Turning Point – Making Sense of 2017 and Beyond

- A brave new world? A changing, uncertain new world order is emerging. Increasing immigration and inequality in a low growth, low rates world is leading to discontent with globalisation as well as growing domestic populism. What risks does this pose to European economies, and how will consumers respond?
- Demographic insights on the changing economic, political, and social trends that will influence and reshape the retail real estate industry



Dr Amlan Roy
Research Associate, LSE
& Guest Professor, LBS

13:45 Challenges and Opportunities in Uncertain Times

Industry leaders debate the impact on retail real estate. Which markets, sectors and projects will fight to survive and which will thrive?



Andrew Vaughan
Chief Executive Officer
Redevco



David Fletcher
Chief Executive
Pradera



Joseph DeLeo
Senior Partner and Investment
Committee Member
Benson Elliot



Dr Amlan Roy
Research Associate, LSE
& Guest Professor, LBS

14:25 Transformation Through Collaboration – a Warsaw Success Story

The redevelopment of a former distillery as the catalyst for the renaissance of the Warsaw's Praga district is a case study in public-private partnership. What lessons can other cities and developers learn from this complex and unique project?



Michał Olszewski
Deputy Mayor of Warsaw



Mariusz Kozłowski
President of the
Management Board
Liebrecht & wood Poland



Moderator:
Charles Taylor, MRICS
Executive Partner,
Head of Poland
Cushman & Wakefield

14:55 NETWORKING BREAK

15:30 Meeting Places as the Heart of the Community

Changing consumer behaviour is redefining IKEA Centres' strategy. Follow their journey from retail destination to mixed-use developments that boost local economies, create jobs and meeting places for a better everyday life for the many people



Gerard Groener

Managing Director
IKEA Centres



16:00 Start-up Pitch: Matching Smart Natives



Nadja Bilek

Founder and Managing Director
HOLYMESH



16:05 Embracing Disruption – Retailers Rethinking The Future

How are innovative retailers evolving to stay ahead of the competition in the rapidly changing world of retail?



Krzysztof Bocianowski

Leasing & Expansion Director
LPP S.A.

LPP



M^a Ángeles Pérez de Arenaza

Head of Construction and
Property Management
Desigual

Desigual



Hervé Montaner

Europe & Middle East Expansion
Director
Sephora

SEPHORA



Maciej Dyjas

Member of the Supervisory Board
Smyk Holding sp. z o.o. and
Co-Managing Partner & Co-CEO
Griffin Real Estate

GRIFFIN



Moderator:

Yvonne Court

Partner & Head of International
Consultancy, EMEA Cross Border
Retail & Leisure, Cushman &
Wakefield

CUSHMAN & WAKEFIELD

Inspiring Retail Sponsor:



16:45 Start-up Pitch: How to Generate Attention and Convert WOW-factor into Business Advantages



Michael Bjerregaard

Global Sales Director
Realfiction



16:50 Keynote: Retail Reimagined

A visual journey that predicts the fast changing world of ground-breaking retail and what it means for our cities, high streets and, most importantly, our communities



Howard Saunders

Retail Futurist
22and5.com



17:40 OPENING NIGHT RECEPTION

Location: STIXX Bar & Grill

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Programme

TUESDAY, 25 APRIL 2017

08:00 REGISTRATION OPENS

Retail Innovation and Design Trends

Inspiring Innovation Sponsors:



09:00 Welcome Back

09:10 Shaping the Future



Josip Kardun
CEO, Multi Corporation
ICSC Trustee and Chair
ICSC European Advisory Board



Bill Kistler
Executive Vice President &
Managing Director – EMEA
ICSC



Tom McGee
President and Chief
Executive Officer
ICSC

09:20 Start-up Pitch: Merged - Organising Bits and Atoms for Efficient and Engaging Retail Spaces



Simon Liss
Founding Partner – Strategy
& Innovation
Omnifi

09:25 Leveraging New Technology to Improve the Shopping Experience

- From apps to communities – what's on the horizon?
- How are new technologies helping retail places compete?



Delphine Leblanc
Consumer Product Division
Western Europe
Global Retail Director
L'Oréal (NYX Professional Makeup)



Ludovic Flandin
Managing Director CSR and
UR Lab
Unibail-Rodamco



Pascale Bonnard
Founder
Amano

Inspiring Innovation Sponsors:



10:05 Creative Fusion – a New Mixed-Use Recipe

- The hospitality industry is synonymous with guest experience, from reservations to food and beverage and from loyalty to 24 hour use. What can shopping centres learn from this to increase the retail experience?
- How can combining the hotel business with retail, leisure and restaurants drive footfall and increase asset value?



Charlie MacGregor
CEO and Founder
The Student Hotel

10:35 NETWORKING BREAK



11:10 Making Places Magnets

- Discover pioneering initiatives to engage with communities through leisure and food and beverage
- How are innovators creating compelling destinations that better connect with customers, increase dwell time and spend?



wagamama

Brian Johnston

International Managing Director
wagamama



AmRest

Jakub Bilik MRICS

Real Estate Director Central
Europe AmRest



Change Please

Cemal Ezel

Founder
Change Please



CinemaNext Consulting

John Sullivan

Head of Consulting
CinemaNext Consulting



JLL

Moderator:

James Brown

International Director – Head of
EMEA Research & Strategy
JLL

Inspiring Retail Sponsor:



11:50 Start-up Pitch: Creating an Online Shopping Experience in the Offline World



Dropit

Karin Cabili

Founder & CEO
Dropit Shopping

11:55 Retail – the Heart of Great Cities

- A fascinating insight into how retail is driving urban regeneration and reinvigorating economies
- Learn from industry leaders how their companies are at the forefront of transforming communities



MULTI

Josip Kardun

CEO
Multi Corporation



ses

Marcus Wild

Chief Executive Officer
SES Spar European Shopping
Centers



ATRIUM

Liad Barzilai

Chief Executive Officer
Atrium



adg GROUP

Mikhail Pecherskiy

Managing Partner
ADG Group



GRIFFIN REAL ESTATE

Przemysław Krych

Founder and CEO
Griffin Real Estate



CBRE

Moderator:

Andrew Phipps

Executive Director
Head of Retail Research EMEA
CBRE



Programme

TUESDAY, 25 APRIL 2017

12:45 LUNCHTIME ROUNDTABLE DISCUSSIONS

A series of lively roundtable discussions on topics connected to how our industry is Building Communities, Fuelling Economies and Inspiring Innovation on a global scale

Please turn to pages 14-17 for the full list of topics and hosts.

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14:00 NEXT GEN LIVE! presents The Future of Connecting Places, People and Brands

- Building the next gen destinations in a digital age
- Investment and asset management strategies for future communities
- A lifestyle brand's approach to creating communities and retail environments



Henrie W. Kötter
Chief Investment Officer and
Managing Director
ECE Projektmanagement



John Argento
Managing Director
Shinola EMEA

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15:00 Europe's Acclaimed Shopping Centres

Be inspired by Europe's most influential shopping centres which are setting new benchmarks and driving best practice



European Shopping Centre Awards Jury Chair:
João Correia de Sampaio
Executive Director, Property Management & Leasing
Sonae Sierra

15:25 NETWORKING BREAK

16:00 Keynote: Competing for the Future

Hear the perspective of two industry leaders and how they are responding to challenges and opportunities in the current economic environment. What social, political and consumer trends are shaping retail real estate strategies?



Jean-Marc Jestin
Chairman of the Executive Board
Klépierre



John Strachan
Non-Executive Director
intu Properties plc

16:50 Closing Remarks

18:00 NETWORKING AWARDS DRINKS AND DINNER

Incorporating the 41st ICSC European Shopping Centre Awards

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Round Table Discussions

Sponsored by



TUESDAY, 25 APRIL 2017

Hilton Warsaw Hotel and Convention Center - Meza Restaurant, Ground floor 12:45 - 14:00

1

Guests or customers? How are shopping centres using customer experience to drive footfall?

- o Customer service
- o Food & beverage mix
- o Leisure offer
- o Online/Offline coordination (Omnichannel)
- o On-going customer insight
- o Tenant collaboration

Slawomir Murawski

Director of Apsys Lab
Apsys



2

Expand the significance and meaning of your shopping centre

- o Is place-Making more than just creating attractive public space?
- o Why combine shopping with other activities?
- o Equal or different strategies for different types of centres / cities?
- o Counteract vacancy: add financial value or create more attraction?

Arno Ruigrok

Associate Director
Multi



3

Shopping centre rents across Europe – where is the growth?

- o In which markets do we expect rental growth?
- o Which formats are most resilient against declining rents?
- o Is increasing the food offer the means for defending rental levels?
- o Experience with 100% turnover based rental levels

Dirk Hoenig-Ohnsorg

Senior Investment Manager, Investment Management Retail
Union Investment



4

F&B Trends

- o Are we all full now? Is there just too much food?
- o Who are the “newbies”? Where are the new operators coming from?
- o Fine Dining – Will we ever see a Michelin star in a shopping centre?
- o Delivery services – are you getting your piece of that pie?
- o Building better – how do we create great “places for people”?

Jonathan Doughty

Head of Foodservice Consulting
JLL



Colin Burnet

Director - EMEA Retail Research
JLL



5

The Polish Investment Market

Agata Sekula

Head of Retail Investment CEE

JLL

Jeremy Eddy

Head of European Retail Capital Markets

JLL



6

The Hypermarkets' role in Shopping Malls

- o Evolution of the hypermarket place in the Shopping Centre industry
- o Shopping Mall merchandising trends
- o Impact on design, concepts, architecture and construction
- o Challenges in Shopping Mall repositioning
- o Opportunities

Anthony Khoi

President and CEO

Aerium Turkey



7

Inspiring Innovation

Fabrice Paumelle

Head of Retail, Poland & Central

& Eastern Europe

BNP Paribas Real Estate



8

Retail Management of the Future: Focus CEE

- o Who are the customers of the future?
- o Where will they shop?
- o Implications on retail assets and new management approaches

Lukas Schwarz

Head of Shopping Center Services

AT & CEE

CBRE



9

Retail and shopping centres as driver for urban regeneration & neighbourhood revival

- o Shopping centres as market and meeting places as impetus for urban cohesion
- o Quality market place as source for community identity
- o How to combine the need for brands versus local identity, words or deeds?
- o What makes a market place: the ideal mix of retail with other functions

Herman Kok

Head of Research

Multi



10

Promotion of Shopping centres to public, People Centres 2020

- o Role of shopping centres from the customers point of view
- o Importance of customer services
- o The best Shopping centres ambassadors
- o Best ideas to differentiate and create unique People Centre

Jan Kotrbáček

Partner, Head of Retail Services

Central Europe

Cushman & Wakefield



11

Local development & regional variation as innovation booster

- o Culture & cutting-edge-trends for a new shopping-experience

Christoph Andexlinger

Head of Center & Facility Management

SES Spar European

Shopping Centers



Round Table Discussions

Sponsored by



TUESDAY, 25 APRIL 2017

Hilton Warsaw Hotel and Convention Center - Meza Restaurant, Ground floor 12:45 - 14:00

12 Beyond Food Courts

- o From convenience to comfort...
- o Food Courts Vs. Food Halls
- o Food Halls as longer usage anchors

Jorge Morgadinho

Director
Sonae Sierra



13 The future of retail and what it means for retail real estate

- o How will retail look in five years' time?
- o What consumer trends are driving changes?
- o How does this affect the role of the shopping centre?
- o How can shopping centres adapt and evolve to meet this change?
- o How will this affect the asset business model?

Michelle Buxton

Group Managing Director
Toolbox Group



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Discover the true potential of your brand with Innesco's international business consultancy – specialising within the real estate sector. We deliver marketing strategies tailored to your brand and target audiences – activated through media, events digital, marketing and PR. Our integrated approach is firmly focused on building your reputation and brand equity.

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14

**"Where are shopping centres going?"
– are they sustainable and how will
they change to suit new trends**

- o The rise and fall of shopping centres is well documented but which will survive?
- o Why in today's challenging market, where shopping habits and customers are radically changing?
- o How to protect and enhance an asset
- o What to do with ageing centres
- o XXL verses S! What are the dangers of the medium sizes?
- o The convenience trend

Rob Pearce

Consultant
Haskoll



Derek Barker

Managing Director
Haskoll



15

**Romania as a future market for
Shopping Centres**

- o Romanian economy
- o Romanian Shopping Centre Market; today and where are they going?
- o Opportunities for Development
- o Opportunities for Investment
- o Obstacles in the Romanian Market

Ingo Nissen

Managing Director Romania
Sonae Sierra



16

**Using BREEAM as an asset
management tool**

- o The landlord/manager's role in helping to preserve the planet
- o Is future-proofing your assets is the same thing as making them sustainable?
- o BREEAM as a methodology
- o How BREEAM can be an integral part of financial and business planning, and therefore asset management

Clemens Brenninkmeijer

Managing Director Redevco Netherlands
/ Head of Sustainable Operations Redevco
Redevco



17

**New paradigm of shopping centres in
the new retail environment**

- o E-commerce, Omni channel, and automated stores create a strong impact on traditional retail
- o Shopping malls evolution: Tailored customer service, Omni channel, showroom, more entertainment, meeting point and socialization

Olivier Gerard Coester

Board Member
Mayland



18

**Merging Physical and Digital Retail
Channels – Opportunities and
Challenges**

- o What's the point? Does technology improve customer and business outcomes?
- o Cutting through the hype - assessing and testing new technologies
- o Organisational challenges – do we have the right people and processes to cope with digital disruption?
- o What are people trying out now, what are we thinking about for the future?
- o Sharing best practice and insight – how can we support innovation?

Simon Liss

Founding Partner Strategy & Innovation
Omnifi



Retail Tours

WEDNESDAY, 26 APRIL 2017

Tour 1: Retail Tour to Klif, Złote Tarasy & Hala Koszyki

Itinerary Tour 1:

09:00 – 09:15	Coach departs from Hilton Warsaw Hotel and Convention Center to Klif
09:15 – 10:00	Presentation and guided tour of Klif
10:00 – 10:15	Travel to Złote Tarasy
10:15 – 11:15	Presentation and guided tour of Złote Tarasy
11:15 – 11:30	Travel to Hala Koszyki
11:30 – 12:15	Presentation and guided tour of Hala Koszyki
12:15 – 12:30	Coach departs from Hala Koszyki to Hilton Warsaw Hotel and Convention Center
12:30	End of tour

Klif House of Fashion is a concept defined as a premium niche with loyal, demanding customers. The positioning of Klif has evolved over the years after the Warsaw market changed, bringing with it strong competition. The Klif brand has been recognised as one of the trendiest brands in Poland and was twice awarded Superbrands Poland.

Original opening date: **March 1999**

GLA: **18,426 sq. m.**

Extension and Refurbishment date: **two refurbishments, one in 2008 (first floor) and one in 2012 (ground floor and the façade)**

Number of retail levels: **2**

Parking/ Total car spaces: **933**

Average number of visitors per year: **2.5 million**

Developer: **Polinvest**

Shopping Centre Owner: **Paige Investments sp. z o.o.**

Management Company: **Asset Management: AEW Europe;**

Property Management: BNP Paribas Real Estate Poland Sp. z o.o.

Total retail tenants: **104**

Major retail tenants: **Piotr I Paweł Delikatessen, Boss Store, Calvin Klein Jeans, Guess, H&M, Michael Kors, Tommy Hilfiger, Swarovski, Versace**



Złote Tarasy is an entertainment complex in the centre of Warsaw whose transparent roof (designed by the Jerde Partnership) covers its signature central indoor courtyard designed for concerts and similar events.



Original opening date: **February 2007**

GLA: **66.404 sq. m.**

Number of retail levels: **5**

Parking/ Total car spaces: **1,610**

Average number of visitors per year: **21 million**

Developer: **ING Real Estate**

Shopping Centre Owner: **Złote Tarasy Warsaw III S.Á R.L. Spółka Jawna**

Management Company: **Cushman & Wakefield Polska Trading Sp. z o.o.**

Total retail tenants: **194**

Major retail tenants: **Multikino, Saturn, Van Graaf, Jatomi Fitness, H&M, ZARA, Empik, Hard Rock Café, Carrefour.**

Opened in October 2016, the rebuilt **hala Koszyki** was restored to include elements of the original steel structure of the main body and the renovated Art Nouveau building elements. The hall serves as a joint fair and dining venue and the building operates several restaurants, shops and a supermarket.

Original opening date: **October 2016**

GLA: **Retail 7,000 sq. m.; Office 15,000 sq. m.**

Number of retail levels: **3**

Parking/ Total car spaces: **200**

Average number of visitors per year: **2.4 million**

Developer: **Griffin Real Estate**

Shopping Centre Owner: **Griffin Real Estate**

Management Company: **Echo Polska Properties**

Total retail tenants: **40**

Total anchor stores: **Supermarket Piotr I Paweł, Rossmann;**

Major retail tenants: **Restaurants: Warszawski Sen, Port Royale, Sobremesa Tapas Bar; Weranda; Bierhalle, Bar Koszyki, Kago Sushi**



Retail Tours

WEDNESDAY, 26 APRIL 2017

Tour 2: Retail Tour to Atrium Promenada, Koneser & Arkadia

Itinerary Tour 2:

09:30 – 10:00	Coach departs from Hilton Warsaw Hotel and Convention Center to Atrium Promenada
10:00 – 10:45	Presentation and guided tour of Atrium Promenada
10:45 – 11:10	Travel to Koneser
11:10 – 11:45	Presentation of Koneser
11:45 – 12:00	Travel to Arkadia
12:00 – 12:45	Presentation and guided tour of Arkadia
12:45 – 13:00	Coach departs from Arkadia to Hilton Warsaw Hotel and Convention Center
13:00	End of tour

Promenada opened in 1996 and is located on Warsaw's east side. The centre initiated a fascinating redevelopment project, resulting in the sales area increasing to 44,475 sqm sq. m in 2016, with further expansion planned to 90,000 sq. m. by 2020.



Original opening date: **1996**

GLA: **Retail 44,475 sq. m.; Office 10,903 sq. m.**

Extension and Refurbishment date: **2016 (stage 1)**

Number of retail levels: **4**

Parking/ Total car spaces: **1,837**

Average number of visitors per year: **7.5 million**

Developer: **Atrium Poland Real Estate Management**

Shopping Centre Owner:

Atrium Poland Real Estate Management

Management Company:

Atrium Poland Real Estate Management

Centre Manager: **Agata Szczęśna**

Total retail tenants: **181**

Major retail tenants: **Zara, H&M, Reserved, Cropp, House, Home & You, Royal Collection, Kapp Ahl, TK MAXX, Go Sport, Pure Jatomi, Douglas, Sephora, SuperPharm, Rossmann, Empik, Cinema City, KFC, Pizza Hut, Smyk.**

Koneser is located by the thriving Zabkowska Street, in the heart of the Old Praga district. The 5 hectare plot will become a unique residential, commercial and cultural space in the centre of Warsaw. The architectural design for revitalisation of Koneser includes adaptation of old post- industrial facilities and creation of contemporary buildings harmoniously reflecting the landmark urban fabric.



Expected opening date: **early 2018**

GLA: **80,000 sq. m.**

Number of retail levels: **2**

Parking/ Total car spaces: **1,000**

Developers: **Liebrecht and wood Group, BBI Development**

Shopping Centre Owners: **Liebrecht and wood Group, BBI Development**

Management Company: **WeCare (member of Liebrecht and wood Group)**

Arkadia opened in 2004 and is the largest shopping complex in Central Europe with a total of 230 shops, 25 restaurants, and a cinema. ICSC awarded Arkadia as Shopping Centre of the Year in 2004.

Original opening date: **2004**

GLA: **116,00 sq. m.**

Average number of visitors per year:
20 million

Shopping Centre Owner:
Unibail-Rodamco

Total retail tenants: **230**

Major retail tenants: **Peek&Cloppenburg, Empik, Saturn, MAC, Ispot, Nespresso, Etam, Kiko, Tous**



Speakers' Biographies



John Argento
Managing Director
Shinola EMEA

With over 20 years of experience spanning marketing, branding and sales, John joined Bedrock in 2014 to lead business and brand development for both Shinola and Filson. Prior to Bedrock, John worked with many leading luxury and fashion brands including Louis Vuitton, Gucci, Burberry, Giorgio Armani, Diesel, Marc Jacobs, and several others, primarily focused on international markets. He has previously lived and worked in New York, London, Paris, Milan, Montreal and Lausanne, and is currently based in Amsterdam.



Liad Barzilai
CEO
Atrium

Liad was appointed CEO of Atrium in February 2017. Prior to this, he was CIO of Gazit Globe after almost eight years at Atrium where he held a number of senior positions including CIO, Head of Acquisitions and VP of Business Development. During his time at Atrium, the company's standing investment portfolio increased from €1.6 billion to €2.5 billion. Liad is an experienced executive with long-standing hands-on knowledge and understanding of the company, its people, assets and markets. Liad holds an MBA from Tel Aviv University and a BA in Business Economics and Management from Ben-Gurion University.



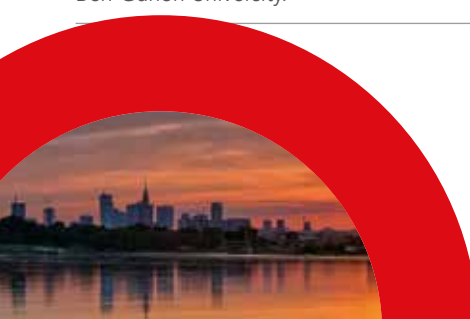
Nadja Bilek
Founder and Managing Director
HOLYMESH

Having studied social science with a focus on business administration, in 2012 Nadja started working for the biggest comedy YouTube channel "Y-Titty" which has over 3 million subscribers. She was soon managing all of Y-Tainment GmbH's financial and strategic affairs. With her experience in the online media business, in 2014 Nadja co-founded the company's new online retail branch "HOLYMESH" – a business division of the Y-Tainment GmbH. She is now co-managing this start-up and supervising the division's business development, marketing and finance. Started as an internet-pure-player distributing its products via a modern online-platform with individually branded online shops, the next project is opening HOLYMESH's first physical store in Berlin this November.



Michael Bjerregaard
Global Sales Director
Realfiction

Michael is a seasoned sales leader and business executive with a wide range of experience in sales and marketing. He joined Realfiction in 2014 as Global Sales Director based in Copenhagen, Denmark, and is responsible for leading the world wide partner network as well as engagement with global brands on all continents. Prior to this, Michael worked for tech company HP for more than 20 years. From 1993 – 2014, he held various international sales and marketing leadership roles at HP EMEA, both in Retail and Commercial business, where Michael successfully drove HP's go-to-market efforts, growing both revenue and operating profit.





Jakub Bilik MRICS
Real Estate Director
Central Europe
AmRest

As Real Estate Director with AmRest, Jakub is responsible for retail network growth of Starbucks, KFC, Burger King, Pizza Hut and Blue Frog. Jakub is a successful leader in retail expansion and business development with 17 years' track record in an international corporate environment. He has profound experience in network development and commercial real estate, and is an expert in strategy implementation and project management. Jakub is a member of RICS and CCIM.



Krzysztof Bocianowski
Leasing & Expansion Director
LPP S.A.

Krzysztof has 24 years' experience in banking and financial services, 13 of which are in real estate related business. Krzysztof started his career in 1991 at Raiffesen Bank Poland, before moving to Citibank Poland, and ING Group at ING Lease Poland, most recently as Deputy Director Structured Finance. In 2006 he joined ING Real Estate Investment Management (now CBRE Global Investors) as Head of Asset Management. Since April 2014 Krzysztof has been heading the expansion of LPP S.A. whose brands include: RESERVED, Cropp, House, MOHITO and SiNSAY. Notably Krzysztof spearheaded the acquisition of RESERVED's flagship store on London's Oxford Street.



Pascale Bonnard
Founder
Amano

Pascale is a French entrepreneur who founded tech company, Amano, in 2013. Pascale started her professional career in consulting initially focusing on business and competitive intelligence, before moving into management and strategic advisory activities as a Partner at Eurogroup Consulting. Her work in the telecom sector led Pascale to observe that technology interfaces and customer journeys needed simplified processes, improved performance and meaningful user experiences. Amano was created to deploy Progressive WebApps (mobile apps with no download or upgrade needed) and its technology is used in airports, shopping malls, hotels, public venues, sports and cultural events. Amano operates in Europe, the USA, Brazil and the Middle East, and has an office in Dubai.



James Brown
International Director – Head of
EMEA Research & Strategy
JLL

James is Global Lead for Retail Research and Consulting at JLL. Working closely with both Retail Research and Consulting and Retail colleagues, James is responsible for co-ordinating and developing all global retail research and client, cross-border consulting needs. Along with his team, he provides strategic advice on retail markets and retail real estate, for developers, investors, landlords and retailers.

Speakers' Biographies



Karin Cabili
Founder & CEO
Dropit Shopping

Karin is the Founder and CEO of Dropit, creating an online shopping experience in the offline world. Her previous experience founding and leading a luxury events company, Karin not only obsessed with detail but creating a seamless customer experience. Her vision for Dropit came on a shopping trip in New York, finding the solution to the hassle and burden of carrying bags. Taking learnings from one-stop-shops in the online market, Dropit offers the same experience in the offline world: unlimited bags from multiple stores consolidated into one convenient and affordable delivery.



João Correia de Sampaio
Executive Director, Property
Management & Leasing
Sonae Sierra

João has more than 23 years' experience in the retail real estate industry. He joined Sonae Sierra in 1992 during which time he has served as Managing Director for property management and leasing business in Iberia. João has been an Executive Director of Sonae Sierra since 2009 and currently manages the company's property management and leasing activities in 12 countries across Europe, Africa and Asia.



Yvonne Court
Partner, Cross Border Retail
Cushman & Wakefield

Yvonne is a Partner in the Cross Border Retail & Leisure team at Cushman & Wakefield. She is responsible for international market entry and location strategy and works globally with retailers and F&B operators. She works with and provides a single point of contact for clients, with whom she applies her many years of experience in international retail strategic consultancy. She has extensive knowledge of advanced demographic analysis and market research techniques in the context of retail and property consultancy projects. Yvonne has a wide range of experience in both academic and private sector property research and consultancy, having been involved with a broad variety of projects on a pan-European and global basis.



Mark Dailey
Partner
Madano

Mark is a Partner at the Madano Partnership who advises boards and CEOs on strategy and vision, corporate positioning and messaging, strategic internal communications and executive coaching and training. Mark divides his time between providing advisory services and designing learning and development programmes to help support strategic goals such as managing complex change, improving engagement and productivity, and strengthening customer facing communications. Mark began his career in the media and has 12 years' experience in journalism in Canada, Hong Kong and the UK before moving into corporate communications working in London as a global head of corporate communications for Credit Suisse Asset Management, GAM, JPMorgan Asset Management and Standard Chartered Wholesale Banking.

Speakers' Biographies



Joseph DeLeo
Senior Partner and Investment
Committee Member
Benson Elliot

Joseph has over 20 years' experience in the real estate industry across Europe and North America. Joseph joined Benson Elliot in 2008 and co-heads all investment and asset management activity with Patricia Barrigan. Before joining Benson Elliot, he was a Managing Director at Fortress Investment Group in Frankfurt, Germany where he built and managed a team of 40 real estate professionals with investments of €5.5 billion, and led circa €700 million of exits and re-financings. Prior to joining Fortress, Joseph was a Vice President at Oxford Properties Group in Toronto, Canada and worked at Borealis Capital Corp, where he managed a C\$3.8 billion retail portfolio. Joseph began his career in private equity real estate at CIBC.



Patrick Delcol
Chief Executive Officer –
Central & Eastern Europe BNP
Paribas Real Estate, President,
PRCH

Prior to being appointed CEO Central & Eastern Europe at BNP Paribas Real Estate, Patrick held management posts in renowned international firms. He has worked in Poland for the past 21 years, and was board member and then CEO at Centrum Finansowe Puławska and Centrum Banku Śląskiego prior to spells with ING and DTZ. A founder and now President of the Polish Council of Shopping Centers he holds an MBA from the Solvay Brussels School of Economics and Management.



Maciej Dyjas
Member of the Supervisory
Board, Smyk Holding sp. z o.o.
Co-Managing Partner &
Co-CEO, Griffin Real Estate

Maciej has been Co-Managing Partner and Co-CEO of Griffin Real Estate (a leading developer and investor in Central & Eastern Europe) since 2014. He also holds a position of Managing Partner of Cornerstone Partners – a private equity investment firm, active in the CEE region, with an impressive track-record of transactions in healthcare and pharmaceutical sectors, retail and consumer goods market, industrial and manufacturing and infrastructure. Before joining Griffin and Cornerstone, he was a Managing Partner and CEO of Eastbridge Group – a family holding company based in Luxembourg. Maciej holds degrees in Mathematics, IT and Management from the University of Warsaw, Poland and University of Stuttgart, Germany.



Cemal Ezel
Founder
Change Please

After university, Cemal set up and sold a business and, after a period of time travelling, he embarked on a career in the corporate world. After a while, Cemal decided he wanted to change tack and achieve something which would make a difference to people's lives. While on a career break in Vietnam, Cemal was inspired by many initiatives, including a visit to a 'Silent Tea House' run by mute and deaf women. On his return, Cemal enrolled on a one-year course at the School of Social Entrepreneurs, before setting up Old Spike Roastery and Change Please to provide employment opportunities for the homeless through coffee in partnership with The Big ISSUE.



Ludovic Flandin
Managing Director CSR
and UR Lab
Unibail-Rodamco

Ludovic graduated from HEC Paris in 2002 and started his career at Deutsche Bank's M&A team in London, before joining Unibail-Rodamco's French Retail Team as Operating Analyst in 2003. Ludovic was promoted to Operating Manager in 2005 and Group Operating Manager in 2007. He worked in Spain as Director of Operations in 2009 and in 2011 was promoted Group Director of International Leasing. Ludovic has been the Managing Director of UR Lab (Unibail-Rodamco's innovation incubator) since 2013. Launched in 2012, UR Lab organises and accelerates innovation within the Group and ensures that promising ideas receive the dedicated resources they deserve.



David Fletcher
Chief Executive
Pradera

David is the Chief Executive of Pradera, based in London, overseeing the company's global retail portfolio, with assets under management of over €2.7 billion, in nine countries across Europe and Asia. David joined Pradera in 2002 after spending over 10 years working for property consultancy firms focused on all aspects of European retail real estate. He has been instrumental in the company's growth to its current position as a leading global retail investment and asset manager, and more latterly oversaw the creation of the joint venture with Macquarie, creating Pradera Retail Asia, with offices in Hong Kong and Shanghai. David is passionate about retail, in particular globalisation, the evolution of eCommerce and the effects on the shopping centre industry.



Gerard Groener
Managing Director
IKEA Centres

Gerard has been Managing Director at IKEA Centres since March 2016, having joined the organisation as Deputy Manager in June 2015. He has 25 years' experience in retail real estate including a long-standing career at Dutch-based retail property company Corio. Gerard held different positions at Corio from 1996, most recently as CEO from 2008 until 2015 when Corio was acquired by French property company Klépierre.



Speakers' Biographies



Jean-Marc Jestin
Chairman of the Executive Board
Klépierre

Prior to his appointment as Chairman of the Executive Board, Jean-Marc Jestin served as Chief Operating Officer and Member of the Klépierre Executive Board since 18 October 2012. Previously, he held a number of positions in real estate companies. He was notably Chief Financial Officer and then Chief Operating Officer of the pan-European platform Simon Ivanhoe from 1999 to 2007. He then joined Unibail Rodamco's International team, acting as Deputy Chief Investment Officer in charge of acquisitions, sales and M&A transactions. Jean-Marc started his career in 1991 at Arthur Andersen in an Audit function, where he contributed to the development of the Real Estate Practice, having graduated from HEC Paris business school.



Brian Johnston
International Managing Director
wagamama

With more than 30 years' experience, Brian's knowledge and expertise position him well in the international hospitality industry. Having joined GrandMet (now Diageo) in 1984, Brian began his international career in 1990 when he moved to Paris as Real Estate Director to develop Haagen Dazs' European network. He transferred to Burger King in Germany to lead the development of company and franchisee restaurants there. As Senior Director of Business Development, Brian led Burger King's entry into various new territories in Europe and the Middle East. In 2012 he joined Rosinter Restaurant Holdings in Moscow, Russia's leading casual dining company, as Senior VP, Property. Brian joined wagamama in April 2014, as International Managing Director, responsible for managing, developing and growing the franchise business.



Josip Kardun
Chief Executive Officer
Multi Corporation, Chair, ICSC
European Advisory Board

Josip became CEO of Multi Corporation BV in April 2017. Previously, he was Chief Executive Officer of Atrium Group, having joined in February 2014 and appointed as CEO that December after gaining extensive experience in international real estate development, construction, operations and senior management. Josip was Chief Investment Officer and Head of Mergers & Acquisitions and Transaction Management Group at European retail property specialists, ECE Projektmanagement GmbH & Co KG., where he worked for seven years in a number of senior positions. Prior to joining ECE, Josip was General Manager at Sierra Management Germany GmbH, Dusseldorf, with responsibility for leasing activities and centre management. Josip has a law degree from the Goethe University in Frankfurt and sits on the Executive Board of ICSC Europe.



Speakers' Biographies



Bill Kistler
Executive Vice President &
Managing Director – EMEA
ICSC

Bill joined ICSC in June 2016 as executive vice president and managing director of EMEA, serving on the global leadership team. Bill brings more than 30 years of international real estate and non-profit experience. He founded and remains non-executive chairman of the Urban Innovation Network (UIN) and from 2003 - 2009 was president of the Urban Land Institute – EMEA. Prior to this he was General Manager of the Disney Development Company, responsible for Val d'Europe at Disneyland Paris. He has held senior roles at JMB Properties, Cushman & Wakefield and IBM.



Henrie W. Kötter
Chief Investment Officer and
Managing Director
ECE Projektmanagement

Henrie Kötter is Chief Investment Officer, Member of the Board and Managing Director of ECE. He is responsible for leading ECE's global investment activities and the development business. With approximately 199 shopping centres under management in 14 countries and €31 billion of Assets under Management (AuM), ECE is the European market leader in the field of inner-city shopping centres. During his +13-year career at ECE, Henrie has headed several positions both nationally and internationally, including a four-year appointment as Managing Director of the Center Management division overseeing the operations of all ECE centres as well as a team of +2.000 employees. Prior to joining ECE he was with Roland Berger Strategy Consultants.



Mariusz Kozłowski
President of the
Management Board
Liebrecht & woD Poland

Mariusz serves as President of the Management Board of Liebrecht & woD in Poland. He has acquired long-term professional experience in the Polish and CEE real estate market, demonstrating significant expertise in leasing, marketing and corporate communication, as well as capital markets. He was a member of the management board of GTC SA for 14 years, where he was involved in the development and management of approximately 400,000 sq. m. of office and retail projects in Poland, as well as in the first IPO of a real estate company on the Warsaw Stock Exchange. Mariusz is a licensed stock broker who graduated from the prestigious Foreign Trade Faculty at Warsaw School of Economics (SGH) with a Master's Degree in Economics.



Przemysław Krych
Founder & CEO
Griffin Real Estate

Przemysław founded Griffin Real Estate, a Warsaw-based property investment platform with approximately €4 billion assets under investment. Prior to this, Przemysław was Managing Director and Partner of TDA Capital Partners (previously Templeton Direct Advisors) and Manager of Emerging Europe Private Equity Funds. He has held a number of senior positions at Bank Handlowy w Warszawie S.A. (now Citibank Handlowy), including: Member of Management Committee, Member of Credit Committee and Chairman of Investment Committee. Przemysław is an alumnus of the Law faculty at Adam Mickiewicz University in Poznan and he holds a Master of Science degree in Law (summa cum laude).



Delphine Leblanc
Consumer Product Division
Western Europe Global Retail
Director
L'Oréal (NYX Professional Makeup)

Delphine joined L'Oréal group in 1999 as Product Manager. After five years in marketing for the Consumer Product Division France (Lascad and GARNIER), she joined the Professionnel Product Division to work on L'Oréal Professionnel and then Matrix, developing the new brand as Marketing Director. In 2010 Delphine moved to Poland as General Manager of Matrix and Italy in 2012 as Business Development Director of CPD. Delphine had the opportunity to create a new business model and reinvent the shopping experience of traditional makeup brands (L'Oréal Paris, Essie and Maybelline). Returning to France in 2014, Delphine became CPD Retail Director for Western Europe: 18 outlets were opened in seven countries. Delphine has been the European Head of Retail for NYX Professional Makeup since 2015.



Simon Liss
Founding Partner – Strategy
& Innovation
Omnifi

Simon is a digital entrepreneur and innovator, focusing on the application of emerging technologies to solve business problems. He launched a mobile agency in 2006 and in 2014 co-founded Omnifi. The company designs and delivers innovative mobile, digital and IoT projects for retail and leisure clients supported by in-house R&D. Simon also writes and presents on the topic of connected commerce and leads the London based Retail Tech Working Group.



Charlie MacGregor
CEO and Founder
The Student Hotel

Charlie is the founder and CEO of The Student Hotel, a company with strong core values reflecting inclusiveness, unity and social responsibility. Born and raised in Edinburgh, Charlie started working on building sites at the age of 16. By 25 he had bought a small student housing company in the UK. He redeveloped the assets and eventually sold the company 10 years later. In 2005 he moved to Amsterdam and created The Student Hotel with a mission to develop and operate 5,000 student beds within Benelux. Today this mission has been increased to 15,000 rooms by 2020.



Speakers' Biographies



Tom McGee
President and Chief Executive
Officer
ICSC

Tom is the President and CEO of ICSC. Prior to joining ICSC, McGee served as Vice Chairman of Deloitte, LLP, one of the largest professional services firms in the United States. During his 26 years with Deloitte, Tom held major global and U.S. leadership roles, including, among others, Vice Chairman, Deputy CEO, National Managing Partner of M&A Services and Global Chief of Staff. He has also been a member of Deloitte's Global and US Executive and Operational Leadership Committees.



Hervé Montaner
Europe & Middle East
Expansion Director
Sephora

Hervé was Sephora's European expansion manager for eight years before becoming expansion director for Europe & Middle East in the summer of 2015. Hervé has also worked as the expansion director at Toys R Us in 2006-2007 and at C&A for five years from 2001 to 2006.



Michał Olszewski
Deputy Mayor of Warsaw

As a deputy mayor, Michał is responsible for supervising strategic planning and acquisition of EU funds, regional development policy, tourism, labour market, development of the wharfs along the Vistula river, business licensing, housing policy, regeneration activities, environmental protection, development of green areas and urban forests, waste management, architecture and planning. He leads the Warsaw Council for Innovation policy. He also represents EUROCITIES in the Smart Cities High Level Working Group in the European Commission, and is involved in strengthening the cooperation of local governments on a national level and in metropolitan areas.



Mikhail Pecherskiy
Managing Partner
ADG Group

Mikhail was working as Vice President at Alfa-Bank for six years, before he founded ADG Group in 2003. ADG Group used to specialise in territory development. Nowadays it manages US \$1.5 billion of own and attracted investments in Russia, and is implementing one of the most ambitious projects in the Russian real estate market – a network of 39 neighbourhood centres. Mikhail graduated from State Technical University of Kaliningrad before moving to Moscow where he obtained MBA.



Mª Ángeles Pérez de Arenaza
Head of Construction and
Property Management
Desigual

Mª Ángeles Pérez de Arenaza has been Head of Construction and Property Management at Desigual since 2015, having joined the company in September 2010 as Project Manager. Since then, she has assumed a number of responsibilities and lead the construction projects of various commercial formats across all channels and countries. Mª Ángeles graduated with a degree in Architecture (UPC) and earned a Master's degree in Construction Management (URL). She is currently taking a Management Development Program at IESE (Barcelona).



Andrew Phipps
Executive Director, Head of Retail
Research and Consulting EMEA
CBRE

As Head of retail research and consulting at CBRE, Andrew directs the research and consulting agenda to ensure the focus is deliver answers that give clarity and drive actionable insights across all aspects of retail. With more than 25 years' experience in the retail industry working both client and agency side, Andrew has a real appreciation of consumer behaviour and how the changes in the social and economic environment are driving further change in the industry. Andrew has worked with a number of international brands, such as Nokia, BP, Exxon Mobil, Marks and Spencer, Unilever, PepsiCo, across many aspects of their business, including global business diagnostics, format planning, fascia development, category management.



Dr Amlan Roy
Research Associate, LSE
and Guest Professor, LBS

Dr Amlan Roy is an experienced global macro-finance researcher and thought leader specialising in demographics related to economics, investments and social policy. He presents to institutional clients in the private and public sector across 30+ countries. He is a Senior Research Associate at LSE and Guest Finance Professor at LBS. He worked for Credit Suisse Investment Bank from 1998-2016, most recently as Head of Global Demographics Research. He developed global risk and asset allocation models serving as an international expert on financial architecture. Prior to this, he spent a decade in academia with a distinguished teaching career in the US and UK. He was UK ESRC Research Fellow, Ponders Fellow, a Boston University Doctoral Scholar and a Government of India National Scholar.



Speakers' Biographies



Howard Saunders
Retail Futurist
22and5.com

Howard has been shaping retail for thirty years. As a former creative director of Fitch responsible for retail design and branding, over the last decade he has focussed his skills on helping his clients better plan for the future. For the last four years he has been based in New York advising international clients including CBRE, Johnson & Johnson, The Consumer Goods Forum, Ebay Enterprise, L'Occitane, Magento, Mothercare, Oracle, Permira, Telstra and Westfield World Trade Center. Howard is passionate about the fast changing world of retail and what it means for our cities, high streets and, most importantly, our communities. His latest book 'Brooklynization' examines the retail revolution that's regenerating the poorer parts of town, was published in April 2017.



John Strachan
Non-Executive Director
intu Properties plc

John Strachan is a Non-Executive Director of intu Properties plc, the London based REIT and owner of nine of the UK's top 20 shopping centres, together with a growing presence in Spain. He was formerly Global Head of Retail at Cushman & Wakefield and is a member of both the Global and European Executive Boards of ICSC.



John Sullivan
Head of Consulting
CinemaNext Consulting Ltd.

John has more than 40 years' experience evaluating the strength of hundreds of leisure locations from a cinema perspective. In 1991 John developed his first 'arts' orientated multiplex cinema in Sydney swiftly followed in other cities across Australia. From 1994 he has worked with Village Cinemas International, Warner Theatres International, CGV cinemas (South Korea), Warner Village Theatres (Europe and Asia), VUE Cinemas and others, leading design and operations teams to establish sensational leisure destinations. John founded Cinema Next Ltd with partner Keith Pullinger in 2002. They provide cinema and wider leisure consultancy services to property owners/ developers, asset managers, investors and local authorities.





Charles Taylor, MRICS
Executive Partner,
Head of Poland
Cushman & Wakefield

Charles is the Head of Poland at Cushman & Wakefield and a Partner with over 25 years' experience in the property profession. Prior to taking the country head position in Poland in July 2013, he was managing the Budapest office of Cushman & Wakefield for the last 15 years. Before that, he worked in C&W's London office, where he was responsible for retail agency in Central London. Charles has developed a significant track record of successful investment transactions across the CE region and advises many of the leading institutional and private investors in all aspects of commercial property.



Marcus Wild
Chief Executive Officer
SES Spar European Shopping
Centers

Marcus is the CEO of SES Spar European Shopping Centers, the strategic real estate and shopping centre unit of the SPAR Austria Group, which he joined in 1994. His experience in retail, real estate and shopping centre development spans 20 years. Marcus is a member of the administrative board of ASIPIAG Despar Italy, and served as Chair of the ICSC European Advisory Board from 2009-2012. In 2013 Marcus was elected by ICSC's Global Executive Committee as the Divisional Vice President for ICSC's European Division and he also serves on ICSC's Board of Trustees.



Andrew Vaughan
Chief Executive Officer
Redevco

Andrew joined Redevco in 2000 as Managing Director Redevco UK. He was appointed Managing Director Redevco UK/Nordics in 2004 responsible for the UK & Nordic portfolio worth €1.2 billion. In 2007 he was promoted to the Board as Chief Operating Officer for Western Europe (except Benelux). He was in charge of activities across 10 countries accounting for a portfolio value of approximately €5.0 billion representing 70% of the total portfolio. In 2010 he assumed responsibility for the entire European portfolio and was appointed CEO in November 2011. Prior to joining Redevco, Andrew worked for Friends Provident Life Office (1992-1997) and in 1997 he joined the Moorfield Group Plc as investment and development specialist, and managed the joint venture partnership with the Blackstone Group.

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