

1CSC Retail Strategy& Trends Forum 28-29 November 2013

Andel's Hotel, Prague, Czech Republic

Driving Value in an Evolving Retail World



DISCOVER

strategic initiatives that deliver value in a challenging environment

DEBATE

the opportunities and take away practical solutions

DRIVE

your business with strategic insights

WORK TOGETHER

with asset managers, investors, developers, researchers and advisors to gain competitive advantage

Key Speakers include:

Andrew Goodwin

Senior Economist, Oxford Economics

Karl Kalcher

Managing Director, MindFolio

Tom Newton

Director, Eurocommercial Shopping Centres

Robert Welanetz, SCSM

Past Trustee ICSC, Global Retail Advisor, Blackstone Real Estate Partners

Mark Gamble

Executive Director Asset Management, Meyer Bergman

ICSC European Partners



Aareal Bank Group













Event Sponsors





Driving Value in an Evolving Retail World

For the first time, ICSC Europe is bringing together industry experts in the fields of asset management and research for a new event, the ICSC Retail Strategy & Trends Forum in Prague on 28-29 November 2013.

The theme of this must-attend event is "Driving Value in an Evolving Retail World". Experts will provide insights into the changing market dynamics (economy, consumers, technology) and demonstrate practical solutions delivered in shopping centres across Europe. The Forum gives you the opportunity to network with fellow professionals and debate ideas and solutions with expert speakers. The attendance fee also includes a complimentary tour of Prague's finest shopping centres. Make sure that you join us in Prague and become part of the debate.

About ICSC

ICSC is the global trade and professional association of the shopping centre industry. We are a not-for-profit organisation with over 60,000 members across 90 countries worldwide.

We represent everyone in the industry, including developers, managers, retailers, investors and service providers. We support you and your company to make the most of business opportunities. With our ICSC Europe team and the global network of ICSC members, we provide you with the services to "EARN" more.

Education We offer high quality and customised professional education programmes for those seeking global industry recognition. Through our ICSC European Awards programme you can learn from best practice and recognise professional achievement.

Advocacy We act as champion of the industry and we provide our members with a unique opportunity to influence European Union policy, and public debate, on the retail real estate industry.

Research Our members have direct access to global retail real estate intelligence and research, including a dedicated European research service. ICSC's vast statistical database and online library is a unique and valuable research tool.

Networking Our members enhance their visibility within the industry by attending ICSC deal-making events, conferences and seminars. We give our members the opportunity to build strong, long-lasting business relationships, and discuss key issues within Europe and provide connectivity to other global markets.

To find out more about ICSC membership, please contact: Michel Zalac, Membership Manager Phone: + 44 20 7976 3104 or email: mzalac@icsc.org



ICSC NEXT GENERATION PROGRAMME (ALL MEALS INCLUDED)

Don't miss this unique opportunity to network with and learn first-hand from the industry's most senior professionals. If you are interested to attend the Next Generation programme on Thursday evening and Friday morning, please contact Michel Zalac for more details.

THURSDAY 27 NOVEMBER

17:40 - 23:00 Networking Drinks Reception and Exclusive Next Generation Dinner with Josip Kardun

The Networking Drinks Reception will be followed by an Exclusive Next Generation Dinner with **Josip Kardun**, Chief Investment Officer at ECE Projektmanagement. Josip will share and discuss his experiences as to how ICSC Next Generation has benefited him and the companies that he worked for, across Europe and, especially, in the CEE region.

FRIDAY 28 NOVEMBER

08:00 - 09:00 Business Breakfast with Robert Welanetz, Dušan Mrosek and Jonathan Hallett

Robert Welanetz SCSM, Past Trustee ICSC and Global Retail Advisor at Blackstone Real Estate Partners, will be part of an open panel discussing during a Business Breakfast together with **Dušan Mrosek**, Chairman, Marks & Spencer and **Jonathan Hallett** Managing Partner, Central Europe at Cushman & Wakefield, to discuss 'What do you need to build a successful CEE/International career?', moderated by **Josip Kardun**.

09:00 –11:00 Interactive Workshops: 'New Income/Lease Models, Addressing the Digital Shopper, Getting the Retail Mix Right'

After the Business Breakfast Next Generation attendees are welcome to join the two interactive workshops, starting at 09:00 and at 11:00 about: (A) New Income/Lease Models, (B) Addressing the Digital Shopper, (C) Getting the Retail Mix Right.

All Next Generation registrants are subject to approval.

To receive regular updates about Next Generation activity, please to join our Next Generation LinkedIn page and follow our ICSC Europe Twitter account. For more information about ICSC Next Generation events, please visit our ICSC Europe website or contact Michel Zalac on +44 20 7976 3104.

ICSC Next Generation Sponsors







Programme

Day One 28 November 2013

10:30 REGISTRATION OPENS

11:00 Welcome Remarks

Conference Chairs:

Alexandra Petit, Group Head of Insight, Hammerson & **Robert Bonwell,** CEO EMEA Retail, Jones Lang LaSalle

11:10 KEYNOTE ADDRESS Examining the Current Economic & Financial Outlook

- The Eurozone is out of recession but what will the recovery look like?
- Has the Eurozone crisis been solved or is there more work still to do?
- When will consumers have the means and the confidence to start spending again?
- · How will the picture vary across regions and cities?
- · What are the risks to the outlook?

Andrew Goodwin, Senior Economist, Oxford Economics

11:50 European Retail Destinations

Leading retailers and investors highlight and discuss the trends revealed in the European Retail Atlas and the joint research project between ICSC Europe & PropertyEU.

12:10 Investment Strategies

- Where to invest in the next ten years
- · Which retail centres are investors interested in
- · Geographical and regional differences
- · Investing in emerging markets
- Practical case studies

Panellists:

Tom Newton, Director, Eurocommercial Shopping Centres **Martin Sabelko**, Managing Director CEE,

CBRE Global Investors

Sarah Slater, Director, Canada Pension Plan Investment Board

Robert Welanetz SCSM, Past Trustee ICSC, Global Retail Advisor, Blackstone Real Estate Partners

Moderator:

Robert Bonwell, CEO EMEA Retail, Jones Lang LaSalle

13:00 NETWORKING LUNCH

14:00 The Mighty Challenge for Retail Destinations in the Amazon Age: 'Delivering Value for Time'

- Efforts to gain 'Share of Wallet' face a powerful new gatekeeper
- 'Value for Money' unlikely to be the competitive battleground of the future
- We'll be forced to acquire new competencies and sensibilities, e.g.:
- To respond to trade-offs between 'surfing time' and 'socialising time'

- To apply the innovation and place-making tools of the 'Amazon Age', e.g.: stimulation mapping, co-creation and forensic experience design, etc.
- To pursue new alliances, co-tenancies, digital leasing dimensions, etc.

Karl Kalcher, Managing Director, MindFolio

14:40 Creation of value - Usage of an ecommerce and multichannel strategy in shopping centres

- Drivers of change and the role of the consumer
- Using the digital offering to transform behaviour
- Implementation of an ecommerce strategy in shopping centers

Scott Bennett, Marketing – Services & Online, Multi Mall Management

15:30 NETWORKING BREAK

16:00 PANEL DISCUSSION Exploring the Value of Asset Management

- · Driving value through repositioning
- · Maximising the value if existing centres
- Remodel and revitalise of older centres

Ashley Blake, Director, Head of Retail Portfolio Management, Land Securities

Mark Gamble, Executive Director Asset Management, Meyer Bergman

Josip Kardun, Chief Investment Officer,

ECE Projektmanagement

Gontran Thüring, Chief Leasing Officer and Member of the Executive Committee, Klépierre

Moderator:

Adam Starr, Managing Director, Redevco

16:50 CLOSING ADDRESS The Shopping Centre of the Future

- · Design trends
- Consumer patterns
- · The digital shopper

Ibrahim Ibrahim, Managing Director, Portland Design Associates Ltd

17:20 ICSC Announcements

Sarah Banfield, Senior Research Analyst, ICSC Europe **Julian Long,** Managing Director, Foundation Recruitment

17:30 CLOSING REMARKS

17:40 NETWORKING DRINKS RECEPTION

Day Two 29 November 2013

08:30 REGISTRATION OPENS

09:00 INTERACTIVE WORKSHOPS

- A. New Income/Lease Models
- B. Addressing the Digital Shopper
- C. Getting the Retail Mix Right

10:30 NETWORKING BREAK

11:00 INTERACTIVE WORKSHOPS

- A. New Income/Lease Models
- B. Addressing the Digital Shopper
- C. Getting the Retail Mix Right

12:30 NETWORKING LUNCH

13:30 SHOPPING CENTRE TOUR Centrum Černý Most, Letňany, Nový Smíchov

17.30 RETURN TO ANDEL'S HOTEL

Registration Form 28-29 November 2013 • Prague • Czech Republic

Four easy ways to register For information on registration, please contact our team www.icsc.org/2013RAMC at icsc.europe@icsc.org +44 20 7976 3100 **Deadlines** For your name to appear in the main list of delegates, +44 20 7222 7791 we must receive your registration and payment by 22 November 2013. International Council of Shopping Centers/Europe LLC, 1221 Avenue of the Americas, New York, NY 10020-1099, USA **Delegate Registration** First name Surname Company name Position Type of business ICSC Membership number Address City Postcode Country Tel no Fax no E-mail (for correspondence) **Registration Options** Standard Registration €329.00 + €69.09 VAT = €398.09 **Discounted Member fee** €439.00 + €92.19 VAT = €531.19 Non-member fee **Next Generation Registration** All Next Generation registrants are subject to approval. Whole Conference €150.00 + €31.50 VAT = €181.50 Member fee €200.00 + €42.00 VAT = €242.00 Non-member fee Next Generation programme only (all meals included) Thursday drinks/dinner + Friday Business Breakfast €50.00 + €10.50 VAT = €60.50 Member fee + Workshops €75.00 + €15.75 VAT = €90.75 Non-member fee **Group Discounts** Attendees must be from the same organisation to be eligible for the group discount and must be registered and paid for at the same time. Please note that this is not available for online bookings and Next Generation registrations. 3-5 attendees 10% discount 6-9 attendees 12% discount 10 more attendees 15% discount **ICSC Membership** To qualify for the discounted member fee, each registrant must be an ICSC member. For further information on registration and membership please contact Michel Zalac on +44 20 7976 3104 or icsc.europe@icsc.org Optional Event Shopping Centre Tour 29 November 2013 (Complimentary) There are a maximim of 50 places available which are allocated on a first-come, first-served basis. If the tour is fully booked when you apply, you will be notified immediately. Please indicate which two workshops you would like to attend (available on a first come, first served basis): New Income/Lease Models Addressing the Digital Shopper Getting the Retail Mix Right **Payment Summary** Please add together your sub-totals from previous sections and write the final total here: **Total Payment Payment Details** Cheque. I enclose a cheque for €_ Please make cheques payable to International Council of Shopping Centers/Europe LLC and enclose with your completed registration form. Credit card. Please debit my account for € MasterCard American Express Cardholder's Name Card Number Expiry date Cardholder's Signature

Cancellations/substitutions

Written cancellations/substitutions
Written cancellation and refund requests received at ICSC by 27 September 2013 will be awarded a full refund minus a €150 processing fee. Refunds on cancellations received between 28 September and 25 October 2013 will be subject to a 50% charge. From 26 October 2013, no refunds will be given. All requests for refunds must be received from ICSC in writing. Substitutions can be made at

Invoice. Please issue an invoice using the following details:

Data protection

By entering your details into this form you agree to allow ICSC to contact you via mail, fax, e-mail, phone or otherwise regarding their services and events that may be of interest to you or your colleagues