

COUNTDOWN

TO EXPO REAL 2019

A PROPERTYEU PUBLICATION



NOVA3
MEET THE FUTURE



**BREXIT OR
BUST?**



**URBAN CHALLENGE
LOGISTICS**



**RULES FOR
CYBER
SECURITY**

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WELCOME

This year, the EXPO REAL property trade fair takes place from October 7 to 9 in Munich. With a packed conference line up, over 2,095 exhibitors, 45,000 visitors and 500 speakers, how to make sure you make the most of the event? This special Countdown to EXPO REAL contains some of the key exhibitors and events on the conference agenda that you won't want to miss.

KEEP CALM AND CARRY ON

The mood in the real estate industry continues to be positive but there is a growing watchfulness about general economic developments, says Messe München chief executive Klaus Dittrich. 'For years we've been focusing on the question of when the boom will end – but we don't see any reverse trends, at least not in the participation levels at EXPO REAL.' The economic prospects facing the sector are up for discussion at an EXPO REAL Forum debate entitled 'Keep calm and carry on' on October 8 in C2.320. Another sign of the positive vibe in Munich is the opening of a new hall NOVA3 where innovation-minded and technology companies are concentrated.

More on this on page 4



10 CONFERENCE FORUMS

There are 10 different conference forums taking place at separate venues at this year's EXPO REAL - not to mention hundreds of press and exhibitor events. Innovation across the real estate spectrum, the challenges presented by urbanisation and strategies for investing in Asia are among the subjects up for discussion this year. Brexit, too, is a topic which cannot be avoided and Dr Ulrich Kater, chief economist of DekaBank, will be describing the economic implications of the British withdrawal from the EU in his keynote speech.

Check out the full programme on www.exporeal.net



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**FOR THE LATEST ABOUT THE FAIR
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GET A GLIMPSE OF THE REAL ESTATE FUTURE IN NOVA3

Innovation in the real estate sector will once again come under the spotlight at EXPO REAL. This year, to keep up with the rapid pace of change, the organisers have developed a new concept hall – NOVA3 – to focus on how the industry can benefit from new technologies and the digital age.

Tech Alley and the Real Estate Innovation Forum will take centre stage in the new concept hall, which brings the total number of halls at EXPO REAL to seven. 'In 2018, EXPO REAL was bursting at the seams so we are adding one more exhibition hall this year,' says exhibition director Claudia Boymanns. 'This not only meets the demand for more space and but highlights the theme of innovation. 'Tech Alley, the Tech Talks, the Built World Innovation Contest and the extensive con-

ference programme in the Real Estate Innovation Forum, together with the new NOVA3 Forum, form a unique hub for new thinking and innovation in the property sector.' Several start-ups which first showcased themselves in Tech Alley last year are back this year as main exhibitors - 21st Real Estate, Alasco, BuildingMind, Cloudscraper Europe and Sensorberg. And as well as these 'grown ups', 75 start-ups will also showcase their digital products and ideas. The fledgling firms will again be able to

present themselves to potential clients and investors in the Tech Talk Zone. In addition, the 25 finalists of the Real Estate Innovation Contest will also be featured in Tech Alley. Formerly known as the Real Estate Innovation Network, BUILTWORLD will hold preliminary rounds in Europe's biggest proptech startup competition ahead of the show.



HEALTHY APPETITES THERE'S GREAT FOOD AT GRAND PLAZA

There are lots of places to eat in the exhibition halls and grounds, but some conference goers are not aware that you can also pick up a tasty snack or



sandwich in the GRAND PLAZA retail zone as well. This year there are no less than six stands to choose from, ranging from the filled rolls and potato wedges served by REWE To Go to the snacks and smoothies provided by Kaufland and Lidl. Asian Suite Kitchen by Käfer is also on hand if you get the urge for sushi or noodles. New this year is the joint stall hosted by Beets & Roots and Aqua Monaco, where you can enjoy a seasonal, and health-conscious bowl-based meal and flavoured mineral water or craft soda.



HOW TO FIND THAT JOB IN REAL ESTATE

EXPO REAL is not only an event for established players in the real estate sector and this year dozens of different companies are taking part in the traditional Career Day event on October 9 at the West Entrance. Students and young professionals can meet international employers and make valuable contacts, get career advice and take part in the full conference programme as well. Professionals will also be on hand to give you advice for your perfect job application. CBRE, Lidl, Arcadis and Prologis are among the companies taking part in this year's event.

Wednesday, October 9 from 9am first floor

→ B1.11 and West Entrance

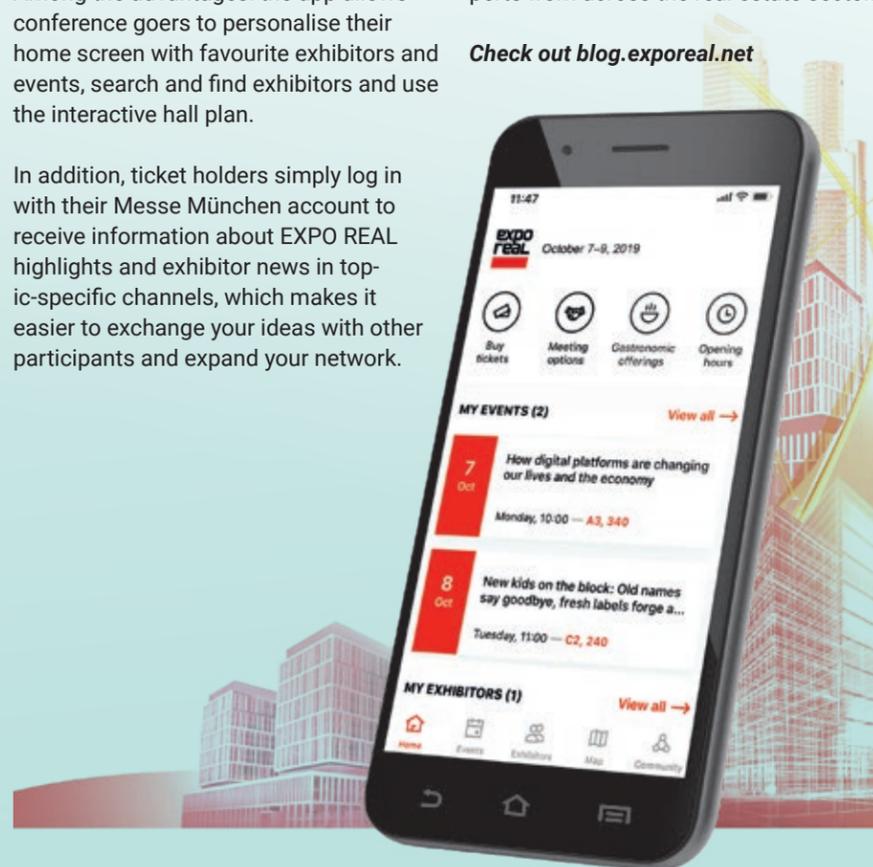
ONLINE INFORMATION START NETWORKING AT EXPO REAL

Networking with other fair goers, planning appointments and checking the conference programme are a whole lot easier thanks to the all-new EXPO REAL app. Among the advantages: the app allows conference goers to personalise their home screen with favourite exhibitors and events, search and find exhibitors and use the interactive hall plan.

Do also keep on top of fair developments and key insights into the European property markets by checking out the EXPO REAL blog, which features articles by experts from across the real estate sector.

Check out blog.exporeal.net

In addition, ticket holders simply log in with their Messe München account to receive information about EXPO REAL highlights and exhibitor news in topic-specific channels, which makes it easier to exchange your ideas with other participants and expand your network.



BREXIT DOES IT STILL PLAY A ROLE IN REAL ESTATE?

Boris Johnson has pledged to take the UK out of the European Union by October 31, no matter what. Sabine Barthauer, a member of the board at Deutsche Hypo, is taking part in the opening debate at EXPO REAL, entitled 'Europe and the spectre of Brexit'.

It is three years since the Brexit vote. Has there been any real impact on the European property markets so far?

The European real estate markets are in a boom phase, regardless of Brexit. Transaction volumes have increased everywhere. In the metropolises in particular, the supply of high-quality real estate is far from keeping up with the high demand. The real estate market in Britain is also continuing to perform well and transaction volumes there remain consistently high. With the exception of the retail sector, price declines in the asset classes are also limited. Nevertheless, Brexit is of course having an impact on the European real estate markets, to the extent that the uncertainty is noticeable among all market players.

Is the Brexit hype over?

I've never noticed any hype. Of course, market players had fears - and still have them today. However, even after Brexit, Britain remains one of the world's largest economies - and probably also the most important real estate market in Europe.

Is the uncertainty created by Brexit damaging?

Uncertainty is always poison for the markets. In this respect, the still open question of what kind of Brexit is coming is detrimental to the real estate industry, firstly because some investment decisions are being postponed. In addition, companies with a presence in the UK



need to find the resources to develop scenarios for how they want to operate from the UK in the future.

What do you think will happen after October 31 after Brexit happens (if it does)?

Once the final decision has been made on what type of Brexit will take place on 31 October 2019, uncertainty will disappear, which is very good for the markets. I do not expect any major price fluctuations in the short term, as the importance of the UK and London in particular will not change. It is quite possible that many investors who have held back investments in the last three years after the Brexit referendum will return more strongly to the UK and the UK market will pick up noticeably as a result. In the long term, it will depend on how the UK economy, on which the real estate market depends, develops. If there is a slow-down, this would of course have an impact on property rents and selling prices.

→ C2.320

'THE IMPORTANCE OF THE UK AND LONDON WILL NOT CHANGE'



New investment locations

There are some new locations in this year's packed Investment Locations programme at EXPO REAL, with Lebanon and Malta both debutants in 2019. Malta has been a member of the European Union for 15 years, but many know little about this island state with big ambitions. Here is your chance to learn more about the real estate and investment opportunities on offer. On Monday afternoon, at the traditional American Afternoon, the investment prospects in the US and Canada are highlighted. In the US, the domestic market is number one and international trade agreements are being questioned. But where does the US stand in a global context and what does this mean for international real estate investments?

→ A1.140



The UK pavilion is open to investors

Britain may be in a state of flux but the UK pavilion at EXPO REAL this year is very much open for business.

New exhibitor Belfast is among the cities, regions and companies which will be showcasing development opportunities in the UK in Munich and the management team of EXPO REAL, who are organising the pavilion, have gone all out to spread the word that the British are still very much here, despite the clouds cast by Brexit.

The British government's housing accelerator Homes England, for example, is keen to showcase its recent deal with Japan's biggest housebuilder which, together with Urban Splash will deliver thousands of new homes across the country. Sekisui House is using modern methods of construction to build high quality homes with short build times, utilising its market leading technology and know-how.

Modern housing methods - including innovation and funding - will come on board at a special panel session in NOVA3, close to the pavilion's traditional home in A2. 'In fact we are making links all across EXPO REAL,' says Julie Fitzsimmins, director of Lodestar which is working on the UK programme with the EXPO REAL team. 'The UK pavilion is getting out there and winning a lot of support.'

EXPO REAL stalwarts such as Liverpool and Glasgow, the Marketing Lancashire organisation, and companies such as Gleeds and Malcolm Hollis are all part of the high profile approach. After all, making cross border connections is crucial to tackle problems such as the shortage of affordable housing.

Homes England confirmed: 'The UK and German house-building markets have similar capacity and infrastructure challenges and we are keen to work with partners in the UK to find innovative solutions. There are significant opportunities to invest in the modernisation of the UK's house-building capacity and deliver a real step-change in output.'

The programme also includes a UK lunch at which foreign investors can find out more about the opportunities on offer.

→ A2.224

'CYBER SECURITY STARTS WITH EDUCATING THE WORKFORCE TO BE AWARE'

Cyber security and its impact on the real estate agency industry is a hot topic at EXPO Real this year. Alexandre Grellier, co-founder of technology firm Drooms, is one of the experts taking part in Wednesday's debate.

The real estate industry is only just beginning to wake up to the need for total information security, says Alexandre Grellier, chief executive of Frankfurt-based Drooms, which specialises in providing real estate firms with a high-security platform to exchange and process confidential data.

'Companies used to be more relaxed but my feeling is this is changing dramatically,' he says. 'Some firms are happy to work with third parties who have no secure infrastructure and place everything in the public cloud. But I do believe there is more sensitivity than before.'

One issue companies have to tackle is that of awareness of privacy issues throughout the entire workforce, he says. 'Some employees are not aware of what can happen if they click on an attachment in an email, potentially releasing a virus,' he says. 'So cyber security starts with educating the workforce to be aware. For example, do they know whether or not they can use an American data room? Many people are not aware that [EU legislation states] no personal data can be stored on servers owned by an American company or the subsidiary of an American company.'

So what will the impact of the increased use of technology in real estate be? For a start, says Grellier, machines will take over the boring jobs. 'Real estate transactions involve a lot of cumbersome work, people

running around collecting information,' he says. 'It takes a long time to do and is personnel-intensive. Documents come from a variety of sources – the owner, the facilities manager and so on – and they all have part of the information. We centralise that in our virtual data room and classify the documents so that the information can be retrieved as necessary.'

Founded in 2001, Drooms, says Grellier, is not a proptech company. 'We are trying to find out what the real estate industry really needs. We are not promoting technologies but solutions to problems,' he says. 'Today everybody is busy talking about AI – it is a big buzzword alongside blockchain – and currently available AI tools are already really helping to optimise work flows and improve the real estate industry's way of working significantly.'

Blockchain, he says, is just another type of technology. 'It is a great one and may solve problems, but the way it is being approached at the moment means we are trying to find the problems to use it on. If you use something like blockchain to build an information tool – such as one that sends out bills – what I am interested in is if the bills arrive on time, not how they got there.'

Join the debate on Wednesday, October 9 at 10.50

→ C2.320

'BLOCKCHAIN IS JUST ANOTHER TYPE OF TECHNOLOGY'



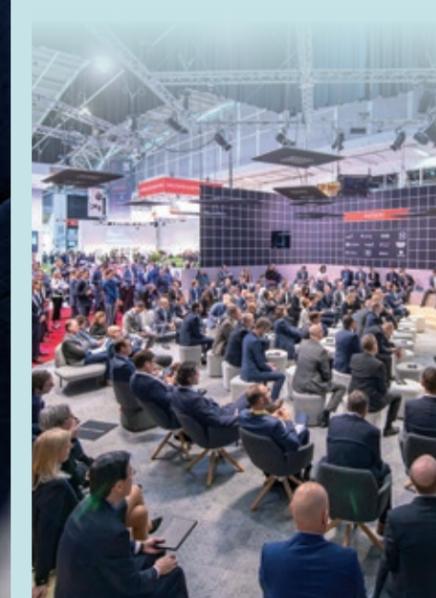
Technology dominates debate, from finance to smart cities

This year's EXPO REAL may have a new hall – NOVA3 – dedicated to innovation, but the issue of technology within the real estate sector is echoed across the complete trade fair – from smart city development to investment and finance.

A series of no less than 26 debates will take place at the Real Estate Innovation Forum in NOVA3, highlighting the impact of technology in every sector. For example, digitally-networked hotel real estate will be debated on Tuesday when the panel will discuss how investors, owners and operators will have to break down their existing processes and rethink the services they offer to add value for guests and boost earnings.

Another session, on Wednesday, looks at digital real estate valuation methods and algorithm-based investment opportunities. The use of technology in developing smart mobility systems is also up for discussion, as is technology in construction processes and its role and impact on co-working. One session is intriguingly entitled 'How to lose all your money, go bankrupt and come back a star'.

→ NOVA3



POLITICIANS CAN'T IGNORE **URBAN LOGISTICS**

By 2050, experts say, one in every three people will live in a big city. Urbanisation is accelerating and that poses enormous challenges for the real estate sector.

Growing populations require living space, especially at affordable rents and online commerce is changing the retail landscape as well. So what are the big issues which planners, politicians and developers should be taking into account? 'The biggest issue is the limited space for new developments for these asset classes and, of course, the fact that all asset classes are competing for the best places or locations in the growing cities,' says Malte-Maria Münchow, head of acquisitions and sales (hotels, logistics and retail) at Deka Immobilien.

Münchow says that from a political perspective, the need for new residential space always has priority and logistics is at the bottom of the priority list. 'The reason for this is easy: tenants or owners of private houses or apartments are voters in the next election. So politicians try to fulfill their requirements first of all, to show good news in the papers,' he says. 'But the more people live in the cities, or the higher the density, the more you need infrastructure for logistics and retail to provide the people with the goods they need.'

Politicians, Münchow argues, are still not focusing on this obvious infrastructure bottleneck and do not have the

answers as to how to serve people at times of growing demand for e-commerce services and infrastructure. 'We will continue to see substantial changes in consumer shopping behaviour,' he says. 'People will buy more online and less offline. But the impact will be different, depending on the product. Clothing stores will suffer more than food shops and many fashion retailers are already adapting their strategies, focusing on shops in the best locations etc.'

Nevertheless, while there are some empty shops in high street locations, this will not be the case in the long run, he says. 'Landlords and tenants are still looking for the right way to deal with the new situation regarding new concepts, rent levels, the mixture of fixed and turnover rents, lease length, incentives etc. It is only a question of time before we find the right equilibrium in a new shopping world.'

Malte-Maria Münchow will be one of the speakers at the Masterminds session on the impact of urbanisation, e-commerce and new mobility at EXPO REAL on October 9

→ C2.320

**'THE LACK OF
SPACE IS THE
BIGGEST ISSUE'**

Are you a logistics winner?

The shortlist has been whittled down from dozens of projects and the winner of this year's Logix award for logistics projects will be announced at EXPO REAL in October. This year's shortlist covers a wide range of projects – from large distribution centres to innovative last-mile online food logistics facilities and CO2-neutral buildings.

The aim of the award, and the Logix Initiative is to create a constructive dialogue between the logistics industry, communities and developers, says organiser Jens Tosse.

'It not only helps us communicate that logistics real estate is better than its image would suggest and sets standards, so we can avoid mistakes which may have been made in the past. A logistics facility must fit into its surroundings, it has to integrate in the landscape and community and should not overwhelm the city with traffic and noise. Developers seem to be more sensitive about this nowadays.'

No space, no permits

This year's Lets Talk Logistics session at EXPO REAL focuses on the problems facing the sector in a 90 minute discussion entitled 'No space, no permits, no logistics real estate – how can we achieve a breakthrough?' The session takes place as part of the Intelligent Urbanisation Forum in Hall C1 on October 8.

This year too, for the first time, most of the logistics companies are concentrated in hall C2, which will make it easier for visitors to get an overview of which players are in Munich.

→ C2 and C1.442

DUTCH AIM TO DRIVE OUT GAS AND PETROL

Ambitious plans to phase out the use of gas in private homes and encourage alternative forms of transport are driving the Dutch approach to modern urban development.

Wonderwoods, a state-of-the-art mixed-use project underway in Utrecht, is the epitome of the Dutch approach to sustainable cities. The block, kitted out with the equivalent of one hectare of trees and greenery, will have far fewer parking spaces than a regular office development but will go big on bikes and pedestrians. It is, says Pieter Vandeginste, fund director of the ASR Mobility Fund which is backing the project, typical of the company's approach to urban development. 'Every investment we make involves looking at the impact on climate and sustainability,' he says. 'We look at how people commute and ask if it is possible to change the way they travel and make developments both more sustainable and healthier places to live and work.'

All over the Netherlands, new residential projects are being realised which focus on downsizing use of the family car. Shared electric cars are being given space in car parks, cycling is being encouraged and the importance of developing public transport networks is moving higher up the political agenda.

It is all part of a government drive to focus on reducing the impact of climate change, by tackling the issue at source. If the ambitious plans are realised, by 2050, no homes in the Netherlands will be attached to the gas supply. No new homes are currently being built with gas connections for heating or cooking and work on transforming the country's current housing stock is beginning to pick up steam. The petrol driven car is also on its way out. By 2030 the Dutch capital Amsterdam aims

to have banned all but electric cars from the city's streets. 'The Netherlands is unique in the way agreement has been reached on transitioning to a gas-free society across such a broad range of groups and organisations,' says Harm Janssen, regional director north west at Dutch developer BPD.

The biggest five Dutch cities and a string of leading developers and investors have been working together for several years now, with the aim of developing tens of thousands of new homes in sustainable urban areas which will meet the needs of the next generations. 'We understand the importance of working together within the Holland Metropole group,' says Dick van Hal, chief executive at real estate investment company Bouwinvest and one of the main drivers of the project. 'We also know that it is crucial to look differently at area developments to ensure they remain attractive places to live. Mobility is key and we must make sure the infrastructure is there before the buildings. We are looking at the issues from the bottom up – from the perspective of developers, investors and locals. This is the way to build a sustainable approach to urban development.'

The Holland Metropole group will have a joint stand at this year's EXPO REAL where developers and investors can find out more about this collaborative Dutch approach to urban development.

Holland Metropole pavilion

→ A2.230

'WE NEED TO LOOK AT THE ISSUE FROM THE BOTTOM UP'

The vegetation covering the Wonderwoods project will absorb carbon dioxide and produce oxygen in its place



Innovating cities

Housing is the subject on everyone's lips at the moment, with debate raging about how to develop cities in a smart and sustainable manner, while ensuring there is enough affordable accommodation for growing urban populations. There are plenty of ideas around about how to solve the problem, whether by regulating rents, simplifying planning procedures or re-inventing forms of living, but developing common ground is essential. The Intelligent Urbanisation forum aims to help find a way forward. For the full debate line-up, see the EXPO REAL website www.exporeal.net.

→ C1.442

Revitalising Romania: Bucharest launches centenary project

A major project to revitalize one of the least developed parts of Bucharest will be highlighted at EXPO REAL this year. The Bucharest Centenary Project aims to breathe new life into part of the Romanian capital which has so far lagged behind the rest but which offers great potential to investors and developers.

The city is divided into six sectors and Sector 5 is seen as the one with the greatest potential. It is a populous part of the city with some challenging social problems, but also has a rare 95-hectare site earmarked for development that is just four kilometres from the city centre and already well-served by trams and buses/public transport. The Antiaeriana site was originally used by the military but is about to become the centre of the largest urban development project in the country – creating 1.6 million m² of new buildings. The World Bank has come on board and will provide technical support for transport planning and the best strategies for integrating the project into its existing urban surroundings.

The master plan envisages 10,000 residential units to house up to 30,000 people, 70,000 m² of retail space, 300,000 m² of office space, four schools, six child day care centres and a 30,000 m² health centre. The ambitious project also includes a multi-purpose, 5,500-seat sports arena and roughly half of the entire development area has been earmarked for green spaces. The local authority will first realise the main streets and the urban infrastructure, the public transport and the green spaces.

Project leader Rares Hopinca will be taking part in a panel on developing brown and greenfield sites in CEE and SEE at the Investment Locations Forum on Wednesday.

→ A1.134

NICHE HOTEL GROUPS CONTINUE TO GROW

How many brands can the hotel market take? Small chains and boutique hotels are starting to show the big boys how it is done.

**'NICHE PLAYERS CAN
ACT FASTER THAN
THE BIG CHAINS'**

A number of new niche hotel exhibitors are joining EXPO REAL this year, as the hospitality sector continues to gather interest from investors and developers. In addition to established hotel groups such as Scandic Hotels, King's Hotels from Munich and Achat Hotels, new players such as the Gorgeous Smiling Hotels group will be part of the expanded World of Hospitality stand in hall A2.

Earlier this year Gorgeous Smiling Hotels acquired Rilano and is likely to have a network of 100 hotels, primarily franchises, within a few months. The fast-growing brand operates five own labels, including the Arthotel Ana and the Bento Inn, which, the company says, 'offers much functionality and versatility in a small space, similar to the Asian bento lunchbox'. It also operates as a franchise for the Holiday Inn, Hampton by Hilton and Super 8 budget brands.

'These niche players can act much faster than the big chains,' says Maria Pütz-Willems, the founder and editor of *hospitalityInside.com*. 'They know the micro markets and

they are very professional. They can act quickly and this is a trend which is proving an increasing challenge for the big groups.' The German hotel sector, she says, has a lot of small and mid-sized hotel groups which have attracted the interest of professional hotel developers. 'They are in demand and are getting easier access to private equity and to institutional investors.'

But as hotel operators develop ever more brands, and their business models become ever leaner, where do the owners fit in? One panel at the Hospitality Industry Dialogue conference programme will focus on the role of real estate owners, amid signs that they may be starting to take back control. The speakers include Andrea Agrusow, COO Central Europe of AccorInvest, a first-time exhibitor at EXPO REAL this year. Stefan Leser, chief executive of the Langham Hotels group and Mark Anderson of Whitbread International Group will also be taking part in the discussion.

→ A2.540

Photo: Gorgeous
Smiling Hotels GmbH

Are you ready for retail?

EXPO REAL's retail market place Grand Plaza is bigger than ever this year, with supermarket giants like Aldi joining the line-up for the first time. The focus is on expansion-oriented retailers, project developers, investors and companies that partner the retail sector. As in previous years, the plaza's 'speakers corner' will be home to a range of discussions relating to all aspects of the retail sector.

According to Colliers International in August, activity in the German retail market has continued to pick up pace, with transaction volumes almost hitting €5 bn at the end of the first half. There may be plenty of activity out there, but the sector is still grappling with the impact of e-commerce. The role of department stores and their fight to retain relevance will come on board at a discussion on Monday in the GRAND PLAZA debate area. How can they win back customers and function as anchor of city centres at a time when e-commerce is eating into their traditional base?

Another debate on Tuesday will focus on the changing role of shopping centres and ask if more food offerings, more entertainment, new services and co-working will help keep shoppers happy and investors in good spirits.

→ C2.240

A full conference programme, exhibitors, events, brokers' reports and breaking news – PropertyEU's team of reporters pack in a lot of hours to bring EXPO REAL's visitors the Daily News. The 48-page daily magazine – produced by PropertyEU on behalf of EXPO REAL – includes reports on panel sessions, interviews with visitors and exhibitors and also carries suggestions about things to do in Munich away from the conference itself.

EXPO REAL will also see the publication of the latest edition of magazine *Firestarters*, which will guide you through the jungle of innovation, proptech, start-ups and eco-systems in the property industry. *Firestarters* has been made possible by founding sponsor EXPO REAL and will be widely available at the trade fair.

Do you want to get your message across in the EXPO REAL Daily News or *Firestarters*? Contact Dean Ireland (ireland@propertyeu.info) or Edward Roche (roche@propertyeu.info) for the options.

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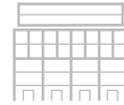
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