



## Polish Residential Market 2019

21-22 October 2019

The conference programme

### 21st October 2019

**8.30-9.00 Registration, breakfast**

**9.00-9.30 In the beginning, there was Chaos. How to manage the city space, so it could serve more than one generation?**

**The opening lecture**

**Special guest:** Andrzej Olbrysz, Head of Department of Investment Preparation and Realization, Lesznowola

**9.30-10.45 Is it time for a change of strategy? The residential market after Q3 2019, diagnosis and outlook** – presentation, discussion panel

- The market situation in the main agglomerations and the short-term outlook.
- The determinants of market developments in the coming year.
- How the economic environment impacts current developer decisions?

Presentation: **Katarzyna Kuniewicz**, Head of Residential Research, JLL Poland

Moderator: **Patrycja Otto**, Journalist, Dziennik Gazeta Prawna

Panelists:

1. **Katarzyna Kuniewicz**, Head of Residential Research, JLL Poland
2. **dr Jacek Furga**, Head of Real Estate Financing Committee, Polish Bank Association (ZBP)/President, Centrum AMRON
3. **Grzegorz Kiełpsz**, President, Polish Association of Developers (PZFD)
4. **Dominik Lewandowski**, Business Development Director, Cenatorium

**10.45-11.30 A mortgage offensive or stagnation? Where the mortgage financing market stands in 2019** – discussion panel

- Is the banking sector bracing for a crisis? Does the current money creation policy favour the mortgage financing market or debt expansion aimed at temporary consumption?
- How does the banking sector see an ideal customer for a mortgage today? Is it still a corporation employee?
- Is there money to finance the supply side (developers), or does demand financing continue to prevail? Where is the balance between institutional risk and individual risk?

Moderator: **Katarzyna Cyprynowska**, Member of Supervisory Board, Nowy Adres



Panelists:

1. **Bartłomiej Marzec**, Head of Investment & Real Estate Market, Open Finance
2. **Piotr Grzybczak**, Vice President of the Board, Notus Finance
3. **Radosław Popko**, Managing Director, Centuria Investment
4. **Paweł Przybyłek**, Director, Credit Products Department, mBank

**11.30-11.40 Innovation & ecology – strong foundation of the Future from innogy**

Presentation: **Sylwia Buźniak**, Sales Coordinator, B2C, innogy Polska

**11.40-11.55 Coffee break**

**11.55-12.45 The coastal tide – will we ride it, or will it sink us? – discussion panel**

- Investment properties in the coastal belt and in the mountains, a passing craze or a permanent trend? Changes in the wealth of Poles, tourism models and their actual impact on the real estate market.
- Short-term rental risks and effective management strategies for investment properties during the holiday season and off holiday.
- Is an apartment all that's needed - what do buyers of investment units expect as part of management programmes. A developer or a cultural animator now?
- Second home market - does it exist in Poland?

Moderator: **Marlena Kosiura**, Expert, Inwestycjewkurortach.pl

Panelists:

1. **Marcin Grzybowski**, President, Apartamenty Złoty Widok
2. **Patryk Kuczwalski**, Branch Manager, Freedom Nieruchomości
3. **Andrzej Szymczyk**, Associate Director, Hospitality Department, Walter Herz
4. **Krzysztof Wiśniewski**, Partner, WIK Capital

**12.45-12.55 THTG Modern Workplace and digital transformation of the residential and commercial developer in the Microsoft cloud**

Presentation: **Rafał Stacha**, CEO, THTG

**12.55-13.55 In-house or external? Is the creation of in-house contracting companies by residential developers a response to market limitations or an evolution of the developer business model? – discussion panel**

- A conflict of interest - how to manage contradictory expectations e.g. on exercising warranty rights.
- Cost optimization - shifting costs within an organization or real benefits.
- Transferring financial and image-related risks between a developer and a structure under their control.



Moderator: **Małgorzata Walczak-Gomuła**, President of the Board, ASM Centrum Badań i Analiz Rynku

Panelists:

1. **Wojciech Caruk**, Independent Real Estate Market Expert
2. **Adam Dąbkowski**, General Director, Nexity Polska
3. **Nikodem Iskra**, President of the Board, Murapol
4. **Michał Melaniuk**, Head of Residential Development Poland, CORDIA
5. **Henryk Urbański**, President of the Board, Budimex Nieruchomości

**13.55-14.45 Lunch break**

**14.45-15.45 When are we going to get flooded? The „concreting” of estates and rainwater management in developer projects as one of the key cost and functionality components – discussion panel**

- The rules on water management in investment projects, retention and discharge conditions.
- How to turn a problem into an advantage - or water arrangement as part of an estate development programme, modern ways to retain rainwater and re-circulate it in a building.
- Examples of attractive rainwater management solutions from the European residential market, or how to combine ecology and functionality.

Moderator: **Andrzej Osiński**, Expert, retencja.pl

Paneliści:

1. **Joanna Kopczyńska**, Vice President for Water Environment Management, Wody Polskie
2. **Ryszard Gajewski**, President of the Board, Gdańskie Wody
3. **Piotr Janowski**, Construction Process Director, Polnord
4. **Narcyz Stefańczyk**, General Director, Sweco Consulting

**15.45-16.45 The effects and industry problems following the entry into force of the Conversion Act and its amendments in 2019. How does the path to changing the perpetual usufruct right into the property right for a residential investment look in reality? – discussion panel**

- What were the reasons for the introduction of Conversion Act?
- Change of the perpetual usufruct right of the plot from the point of view of the developer and of the apartment buyer.
- Mixed-use buildings and allowances - and their granting procedure.
- Is the dissolution of the perpetual usufruct right a first step to the cadastral tax?

Moderator: **Wojciech Doliński**, Managing Partner, TPA Real Estate Services

Panelists:

1. **Agata Demuth**, Partner, Schoenherr
2. **Artur Kędzierski**, Vice President, Warsaw Chamber of Civil Law Notaries
3. **Przemysław Dziąg**, Legal Advisor, Polish Association of Developers (PZFD)



4. **Łukasz Zwiercan**, Counsel, Dentons

**21.00-01.00 Banquet**– PIĘKNO Club, ul. Szpitalna 8A

## 22nd October 2019

**9.30-10.00 Registration, breakfast**

**10.00-10.45 The meanders of the rental market. Why doesn't the rental market go the way charted by analysts?** – discussion panel

- What's inside the rent, or the pitfalls of rent measures (asking rent, repeat rent index, billing periods and rent benefits).
- The dangers of rent regulation by the state or local governments. Experiences of large cities not only from the short-term rental sector.
- Do Poles really want to rent apartments? Between the wishful and the real.

Moderator: **Bartosz Turek**, Chief Analyst, HRE Investments

Panelists:

1. **Anton Bubieli**, CEO, Rentier.io
2. **Jan Dziekoński**, President of the Board, Mzuri Investments
3. **dr Maximilian Mendel**, MRICS, Head of Residential Investment, JLL Poland
4. **Dariusz Węgliński**, Country Manager, Catella

**10.45-11.40 The challenges for the leader, or which way to the top** – discussion panel

- Building the economies of scale effect - sales results or margins?
- What needs to happen outside the market environment to push sales to 5,000 apartments a year?
- A chance for international funds or small shareholders? Who is the scale of a developer company built for?

Moderator: **Anna Andrzejewska**, Senior Manager, EY

Panelists:

1. **Przemysław Adam Borek**, Vice President, Pekabex
2. **Mateusz Bromboszcz**, Vice President of the Board for Legal and Administrative Affairs, Atal
3. **Piotr Goćłowski**, Investment Director, CVI Dom Maklerski
4. **Zbigniew Wojciech Okoński**, President of the Board, Robyng



### **11.40-11.55 Coffee break**

### **11.55-12.50 Does the apartment price include silence, clean air and good energy? How residential developers fight smog and noise emission – discussion panel**

- Between the norms and the needs - is it worth going further with ventilation solutions for residential units than required by law?
- „Anti-smog packages” - a marketing ploy or a real attempt to solve the problem.
- Dreaming of silence - why it is worth to ensure acoustic comfort in apartments. The fight against noise as part of concern for user comfort in the living process.
- Green energy in the apartments – a dream or real opportunity?

Moderator: **Adam Chyliński**, EcoAvengers

Panelists:

1. **Anna Karanik**, Head of Sales Department, innogy Polska
2. **Marzena Maj**, Proxy and Sales Director, SMAY
3. **Marcin Michalec**, Sales & Marketing Director, OKAM
4. **Rafał Schurma**, President, Polish Green Building Council
5. **Wiktor Warchałowski**, CEO, Airly

### **12.50-13.35 The market for services surrounding the development process. How worthy is it to wrap the basic service of building and selling an apartment in a package of additional services? What else can be sold to the customer? – discussion panel**

- Services related to interior design and finishing - are we heading towards the Western „turnkey” apartment standard?
- Services related to security and economy of usage (comprehensive monitoring and security systems, smart home).
- Greenery in apartments and common spaces.
- Does ecology sell? How aware is the apartment buyer and what do they expect apart from a lower bill?

Moderator: **Tomasz Łysakowski**, Sales Trainer, Owner of Trainings.pl

Panelists:

1. **Radosław Borkowski**, Managing Director, Member of the Board, SOMFY Polska
2. **Robert Chojnacki**, President the Board, redNet Property Group
3. **Piotr Kania**, Owner, Green Designers
4. **Wojciech Michnowicz**, Regional Distributor, Ampio SmartHome
5. **Michał Szymański**, Sales Manager, Decoroom

### **13.35-14.35 Are leads still the thing? Trends in marketing communication of developers and campaign effectiveness measures – discussion panel**

- The problem of a rising number of „cold leads”.



# POLSKI RYNEK MIESZKANIOWY

## Polish Residential Market

21-22 października 2019, Hilton Warsaw Hotel

- How to deal with a prolonged process of communicating with customers from the acquisition phase to conversion?
- New communication tools to increase channeling scale and effectiveness.

Moderator: **Patrycja Rabińska**, Managing Director, Mariel & Haan

Panelists:

1. **Magdalena Rudzińska-Młynarska**, Owner & CEO, Avocado Grupa Reklamowa
2. **Marian Bruliński**, Vice President of the Board, Obido
3. **Dawid Wrona**, Sales & Customer Director, Residential Projects Department, Echo Investment
4. **Maciej Zaremba**, Group Account Director, ClickAd Interactive

**14.35-15.30 Lunch**

**15.30 The conclusion of the conference**