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### Registration and morning coffee

09:00 - 09:25  
Networking Breaks

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### Opening welcome from the Chair

09:25 - 09:30  
Energy & Renewables Summit

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### Big picture energy landscape

09:30 - 10:00  
Energy & Renewables Summit

Where are we in the energy cycle? How will macroeconomic and geopolitical factors continue to affect pricing, supply and demand and where are the best opportunities to be found?

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### The shifting energy landscape: How is digitalisation revolutionising the energy sector?

10:00 - 10:30  
Energy & Renewables Summit

Examining how technology is driving the confluence of cost and sustainability to provide new investment models and market opportunities

#### Participants

**Tom Murley** - Founder & Principal, Two Lights Energy Advisors

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### Digitalisation of the energy sector: What does this mean for infrastructure investing?

10:30 - 11:00  
Energy & Renewables Summit

Where do the best opportunities lie for investors and what are the risks in this new and dynamic world?

#### Participants

**Moderator: Tom Murley** - Founder & Principal, Two Lights Energy Advisors

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### Morning coffee and networking break

11:00 - 11:30  
Networking Breaks

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### Keynote Presentation

11:30 - 12:00  
Energy & Renewables Summit

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### Opportunities in power

12:00 - 12:30  
Energy & Renewables Summit

Comparing and contrasting opportunities in power versus oil and gas

#### Participants

**David Milner** - CEO, NuGen Capital  
**Rahul Advani** - Partner, Energy Capital Partners

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### What is the current state of play in renewables?

12:30 - 13:00  
Energy & Renewables Summit

Analysing global investment trends in the renewables sector: where is the money going, and what are the hottest sectors within renewables? Exploring the best strategies in deploying capital. How do you compare opportunities between developed markets and emerging markets?

#### Participants

**Moderator: Simon Eaves** - Managing Director, Head of Clean Energy Infrastructure European Team, Capital Dynamics

**Panellists: Scott Brown** - Founder & CEO, New Energy Capital

**Raphaël Lance** - Head of Renewable Energy Funds, Mirova

**Mortimer Menzel** - Partner, Augusta & Co

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### Keynote address

13:00 - 13:30  
Energy & Renewables Summit

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### Lunch and networking break

13:30 - 14:30  
Networking Breaks

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### Renewables and ESG

14:30 - 15:00  
Energy & Renewables Summit

To what extent do renewables qualify as ESG? Should LPs invest in funds that combine renewables with midstream oil & gas, fracking or power investing supporting coal fired plants? How do these funds meet ESG requirement?

#### Participants

**Panellists: Scott Mackin** - Managing Partner & Co-President, Denham Capital

**Rosheen McGuckian** - CEO, NTR

**Christopher Hunt** - Partner & Managing Director, Riverstone

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### LP perspectives on energy and renewables

15:00 - 15:30  
Energy & Renewables Summit

What role does energy play in an LP portfolio? Comparing direct versus fund investing, risk and return expectations and discussing the most exciting opportunities and growth markets

#### Participants

**Moderator: Mark Weisdorf** - Managing Partner, Mark Weisdorf Associates

**Panellists: Dominik von Scheven** - Vice President, DB Private Equity

**Ryan Sullivan** - Co-Head of Real Assets, Aberdeen Asset Management

**Verena Kempe** - Director, Private Equity, Feri Trust GmbH

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### Unsubsidised world of renewables – opportunities in Latam and Africa

15:30 - 16:00  
Energy & Renewables Summit

Considering developments and opportunities in renewables across different key emerging markets – where do the best opportunities lie and is there sufficient investor appetite?

#### Participants

**Moderator: Jeffrey Altman** - Senior Advisor, Finadvice AG

**Panellists: George Osorio** - Managing Partner, Conduit Capital Partners

**Alexandre Tilmant** - Founder & Managing Partner, TELA

**Nicolas Piau** - Co-Founder & Managing Partner, TILT Capital Partners

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### Networking coffee and refreshments

16:00 - 16:30  
Networking Breaks

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### End of Energy & Renewables Summit

16:30 - 16:35  
Networking Breaks

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# SCHEDULE

ENERGY & RENEWABLES SUMMIT - 17/09/2018

SuperReturn Infrastructure

17 - 19 September 2018  
Sofitel London St James  
London

<b>TIME</b>	<b>ENERGY &amp; RENEWABLES SUMMIT</b>	<b>NETWORKING BREAKS</b>
<b>09:00</b>	<b>09:25</b> - Opening welcome from the Chair <b>09:30</b> - Big picture energy landscape	<b>09:00</b> - Registration and morning coffee
<b>10:00</b>	<b>10:00</b> - The shifting energy landscape: How is digitalisation revolutionising the energy sector? <b>10:30</b> - Digitalisation of the energy sector: What does this mean for infrastructure investing?	
<b>11:00</b>	<b>11:30</b> - Keynote Presentation	<b>11:00</b> - Morning coffee and networking break
<b>12:00</b>	<b>12:00</b> - Opportunities in power <b>12:30</b> - What is the current state of play in renewables?	
<b>13:00</b>	<b>13:00</b> - Keynote address	<b>13:30</b> - Lunch and networking break
<b>14:00</b>	<b>14:30</b> - Renewables and ESG	
<b>15:00</b>	<b>15:00</b> - LP perspectives on energy and renewables <b>15:30</b> - Unsubsidised world of renewables – opportunities in Latam and Africa	
<b>16:00</b>		<b>16:00</b> - Networking coffee and refreshments <b>16:30</b> - End of Energy & Renewables Summit

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### Registration and morning coffee

08:20 - 08:50  
Networking Breaks

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### Chairman's opening welcome

08:50 - 09:00  
Day 1

### Participants

**Chair:** James Wardlaw - Partner, Campbell Lutyens

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### Fireside Chat

09:00 - 09:30  
Day 1

### Participants

**Martin Stanley** - Global Head, Macquarie Infrastructure and Real Assets (MIRA)

**Interviewed by:** James Wardlaw - Partner, Campbell Lutyens

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### National Infrastructure Assessment: A strategic vision over the next 30 years

09:30 - 10:00  
Day 1

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### State of the union

10:00 - 10:30  
Day 1

### Participants

**Panellists:** Peter Hofbauer - Head of Infrastructure, Hermes Infrastructure

**Werner von Guionneau** - CEO, InfraRed Capital Markets

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### Morning coffee and networking break

10:30 - 11:00  
Networking Breaks

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### Keynote presentation / interview

11:00 - 11:30  
Day 1

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### Data presentation: The changing definition of the infrastructure asset class

11:30 - 11:40  
Day 1

A live update from the policy making and regulatory sides

### Participants

**Eugene Zhuchenko** - Executive Director, Long-Term Infrastructure Investors Association

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### The changing definition of the infrastructure asset class

11:40 - 12:10  
Day 1

What are LPs looking for? What do LPs consider when investing in infrastructure and how do infrastructure-lite transactions fit in? What term structures are they most interested in and what strategies or industry sectors are most appealing?

### Participants

**Moderator:** Eugene Zhuchenko - Executive Director, Long-Term Infrastructure Investors Association

**Panellists:** John Anderson - Head of Corporate Finance, Manulife

**Laurence Monnier** - Head of Infrastructure Debt, Aviva Investors

**Martijin Verwoest** - Head of Energy and Utilities, PGGM

**Raffaele Della Croce** - Lead Manager Long Term Investment Project, OEDC

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### Co-investments and direct investments

12:10 - 12:40  
Day 1

Heavy competition in core assets as more investors transition to direct investments? How are platforms and partnerships allowing investors to acquire direct expertise?

### Participants

**Moderator:** Mark Weisdorf - Managing Partner, Mark Weisdorf Associates

**Panellists:** Andrea Echberg - Partner & Head of European Infrastructure and Real Assets, Pantheon

**Surinder Toor** - Partner, Arjun Infrastructure Partners (AIF)

**Tara Davies** - Member and Head of European Infrastructure, KKR

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### Keynote presentation

12:40 - 13:00  
Day 1

What are the key trends that are likely to shape the infrastructure investing landscape going forward?

### Participants

**Deborah Zurkow** - Managing Director and Global Head of Alternatives, Allianz Global Investors

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### Lunch and networking break

13:00 - 14:00  
Networking Breaks

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### Data presentation: benchmarking infrastructure fund performance

14:00 - 14:30  
Day 1

### Participants

**Sarah Tame** - Associate Director, EDHEC Infrastructure Institute

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### Focus on mid-market deals: Why is the mid market the hot strategy of the future?

14:30 - 15:00  
Day 1

Successfully targeting less competitive mid market projects to allow for a more attractive purchase price and higher returns: Finding value by sector, geography and type of investment

### Participants

**Moderator:** Uwe Fleischhauer - Founder & Managing Partner, Yielco Investment

**Panellists:** Dominic Helmsley - Head of Infrastructure Equity, Aberdeen Standard

**Rishi Pabari** - Head of Investor Relations, Icon Infrastructure

**Robert Collins** - Managing Partner & Co-President, 3i Infrastructure

**Graham Matthews** - CEO, Whitehelm Capitalmailto

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### The next generation of infrastructure

15:00 - 15:30  
Day 1

How is the infrastructure asset class evolving? Developing new sources of capital & funding approaches & assessing more innovative & sophisticated approaches to investment strategies.

Assessing the risk/ return balance of core/core plus versus value-add and opportunistic infrastructure

### Participants

**Panellists:** Hakim Drissi - Managing Director, Wren House Infrastructure

**Lennart Blecher** - Head of Infrastructure, Partner & Deputy Managing Partner, EQT Partners

**Hugh Crossley** - Chief Investment Officer, Equitix

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### Afternoon tea and networking break

15:30 - 16:00  
Networking Breaks

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# SESSIONS

MAIN CONFERENCE DAY 1 - 18/09/2018

SuperReturn Infrastructure

17 - 19 September 2018  
Sofitel London St James  
London

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## Effect of disruptive technology on infrastructure investing

16:00 - 16:30

Day 1

The sharpening confluence of energy, transportation and technology: what is the long term outlook for investing in an environment of disruptive change?

### Participants

**Moderator: Viktor Kats** - Co-Head, IFC Global Infrastructure Fund, IFC Asset Management

**Panellists: Ross Israel** - Head of Global Infrastructure, QIC

**Kevin Smithen** - Partner, Digital Bridge

**Willem Jansonius** - Partner, DIF

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## ESG and sustainability as a value driver for performance

16:30 - 17:00

Day 1

The role of ESG in investment decisions and constructing an outward reputation: how does ESG help identify risks and opportunities for value creation? How do LPs evaluate the ESG strategy of a fund manager?

### Participants

**Moderator: Katharina Schneider-Roos** - CEO, Global Infrastructure Basel (GIB)

**Panellists: Rick Walters** - Director, Infrastructure, GRESB

**Gwenola Chambon** - Head of Infrastructure Funds, Mirova

**Steve Hellman** - Managing Partner, Energy Impact Partners

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## Networking drinks reception

17:00 - 18:30

Networking Breaks

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## End of Main Conference Day One

18:30 - 18:35

Networking Breaks

# SCHEDULE

MAIN CONFERENCE DAY 1 - 18/09/2018

SuperReturn Infrastructure

17 - 19 September 2018  
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London

TIME	DAY 1	NETWORKING BREAKS
08:00	08:50 - Chairman's opening welcome	08:20 - Registration and morning coffee
09:00	09:00 - Fireside Chat 09:30 - National Infrastructure Assessment: A strategic vision over the next 30 years	
10:00	10:00 - State of the union	10:30 - Morning coffee and networking break
11:00	11:00 - Keynote presentation / interview 11:30 - Data presentation: The changing definition of the infrastructure asset class 11:40 - The changing definition of the infrastructure asset class	
12:00	12:10 - Co-investments and direct investments 12:40 - Keynote presentation	
13:00		13:00 - Lunch and networking break
14:00	14:00 - Data presentation: benchmarking infrastructure fund performance 14:30 - Focus on mid-market deals: Why is the mid market the hot strategy of the future?	
15:00	15:00 - The next generation of infrastructure	15:30 - Afternoon tea and networking break
16:00	16:00 - Effect of disruptive technology on infrastructure investing 16:30 - ESG and sustainability as a value driver for performance	
17:00		17:00 - Networking drinks reception
18:00		18:30 - End of Main Conference Day One

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### LP only networking breakfast

08:15 - 09:00  
LP Only

Informative & invaluable networking for LPs.

Open to pre-qualified pension funds, foundations, endowments, SWFs only.

To see if you qualify for a place, please contact [savannah.charles@knect365.com](mailto:savannah.charles@knect365.com)

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### Registration and morning coffee

08:30 - 09:00  
Networking Breaks

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### Chairman's opening welcome

09:00 - 09:05  
Day 2

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### Risk and Reward: the investment dilemmas in a time of global political disruption and rising demand for sustainable infrastructure

09:05 - 09:45  
Day 2

#### Participants

**Lord Mark Malloch-Brown** - Senior Policy Advisor, I Squared Capital

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### Data presentation: what are LPs looking for?

09:45 - 10:00  
Day 2

From investment niche to independent asset class: how are institutional investors approaching the

#### Participants

**Kelly DePonte** - Managing Director, Probitas Partners

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### What are LPs looking for?

10:00 - 10:30  
Day 2

What are the drivers of investor interest in infrastructure? Will too much money coming into the market hurt investors' returns? Are we nearing the top of the market cycle? To what extent are investors concerned about geopolitical upheaval?

#### Participants

**Moderator: Kelly DePonte** - Managing Director, Probitas Partners

**Panellists: Andrew Morris** - Senior Principal, Canada Pension Plan Investment Board

**Simon Davy** - Investment Director, Infrastructure, GLIL Infrastructure

**Daniel Fedson** - Director, Global Infrastructure Partner (GIH)

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### How do you get the best out of your business? Defining value-add today

10:30 - 11:00  
Day 2

Assessing the merits of debt funds and the reason for their appeal to investors: What is the outlook for pricing and supply, what does the next generation of debt products look like? Examining the pros and cons of the growing trend for aviation focused debt funds

#### Participants

**Panellists: Stefan Glevén** - Partner, EQT Partners

**Raj Rao** - Partner, Global Infrastructure Partner

**Allard Ruijs** - Partner, DIF

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### Morning coffee and networking break

11:00 - 11:30  
Networking Breaks

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### Infrastructure debt: frothy but still a strong asset class?

11:30 - 12:00  
Day 2

Assessing the merits of debt funds and the reason for their appeal to investors: What is the outlook for pricing and supply, what does the next generation of debt products look like? Examining the pros and cons of the growing trend for aviation focused debt funds

#### Participants

**Moderator: Neale Marvin** - Managing Director, DC Advisory

**Panellists: Greg Taylor** - Founding Partner, Sequoia Investment Management

**Tom Sumpster** - Head of Infrastructure Finance, Legal & General Investment Management

**Darryl Murphy** - Head of Infrastructure Debt, Aviva Investors

**Tim Cable** - Senior Partner, Vantage Infrastructure

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### Keynote address

12:00 - 12:30  
Day 2

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### Regulatory Update

12:30 - 13:00  
Day 2

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### Lunch and networking break

13:00 - 14:00  
Networking Breaks

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### Exposure to emerging market infrastructure for long term growth potential and a balanced portfolio

14:00 - 14:30  
Day 2

How are political changes affecting capital flows? How can market diversification be balanced with risk protection? What measures need to be put in place to counterbalance political, economic and currency risk? Can investing in emerging markets infrastructure meet the need for sustainability by leapfrogging the carbon based generation?

#### Participants

**Moderator: Viktor Kats** - Co-Head, IFC Global Infrastructure Fund, IFC Asset Management

**Panellists: Gregory Bowes** - Co-Founder & Managing Partner, Albright Capital Management

**Pauline Roteta** - Vice President, Blackrock

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# SESSIONS

MAIN CONFERENCE DAY 2 - 19/09/2018

SuperReturn Infrastructure

17 - 19 September 2018  
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## Infrastructure investment models

14:30 - 15:00  
Day 2

Comparing direct, indirect and fund -based approaches: Are direct and co-investment models really suitable for infrastructure investing? What are the key challenges and different skill sets required to make a good co-investor?

### Participants

**Panellists:** **Mike Weston** - Chief Executive , Pensions Infrastructure Platform

**Fabian Pötter** - Co-Head of Infrastructure, Managing Director, Golding Capital Partners

**Struan Fairbairn** - Chief Risk Officer, Lothian Pension Funds

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## Investing in Infrastructure. What could go wrong?

15:00 - 15:30  
Day 2

Assessing the risks – regulatory, commodity, operating, etc

Q&A session run under the Chatham House Rule

### Participants

**Kelly DePonte** - Managing Director , Probitas Partners

# SCHEDULE

MAIN CONFERENCE DAY 2 - 19/09/2018

SuperReturn Infrastructure

17 - 19 September 2018  
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London

TIME	DAY 2	LP ONLY	NETWORKING BREAKS
08:00		08:15 - LP only networking breakfast	08:30 - Registration and morning coffee
09:00	09:00 - Chairman's opening welcome 09:05 - Risk and Reward: the investment dilemmas in a time of global political disruption and rising demand for sustainable infrastructure 09:45 - Data presentation: what are LPs looking for?		
10:00	10:00 - What are LPs looking for? 10:30 - How do you get the best out of your business? Defining value-add today		
11:00	11:30 - Infrastructure debt: frothy but still a strong asset class?		11:00 - Morning coffee and networking break
12:00	12:00 - Keynote address 12:30 - Regulatory Update		
13:00			13:00 - Lunch and networking break
14:00	14:00 - Exposure to emerging market infrastructure for long term growth potential and a balanced portfolio 14:30 - Infrastructure investment models		
15:00	15:00 - Investing in Infrastructure. What could go wrong?		