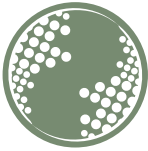




GIIS 2014 PROGRAMME

8:00 - 9:00	REGISTRATION, NETWORKING BREAKFAST
9:00 - 9:15	WELCOMING ADDRESS Mark O'Hare, Founder, Preqin
9:15 - 9:30	KEYNOTE ADDRESS John Moran, Vice President of Insurance, OPIC
9:30 - 10:30	INFRASTRUCTURE INVESTORS ACTIVITY IN 2013/2014 AND BEYOND <ul style="list-style-type: none">• Locations and sectors supporting future growth• Lessons learned & expectations for the year ahead - 2013 Review/2014 Forecast• Challenges facing infrastructure investors Chair: Andrew Davison, Senior VP Project and Infrastructure Finance, Moody's Investors Service Damian Nussbaum, Director of Strategic Relations, UKTI Steve Deeley, Investment Manager, Private Markets, USS Bosworth Monck, Head, Client Relations, IFC Asset Management Company Deeptu Chintamaneni, Vice President, IFM Investors
10:30 - 11:00	DRIVING GROWTH – HOW BIG IS THE INVESTORS APPETITE FOR INFRASTRUCTURE ASSETS Elliot Bradbrook, MD Infrastructure, Preqin
11:00 - 11:30	NETWORKING COFFEE BREAK
11:30 - 12:30	OPENING THE CAPITAL MARKETS TO ALIGN WITH INFRASTRUCTURE INVESTORS PORTFOLIOS <ul style="list-style-type: none">• Investors Route to Market- Direct, Co-Investment and Indirect Investment• Unsecured debt, mezzanine, equity, secured debt or a blend of these• New Models for Infrastructure Investment. Mike Wilkins, Managing Director, Standard & Poor's Ratings Services Allen Twynning, Investment Manager, Pension Insurance Corporation Bill Donaldson, Director, Lenders Advisory Services, Hill International (UK) Limited Stephan Rupert, Director, Infrastructure Investments, PSP Investments Dima Rifai, CEO, Paradigm Change Capital Partners
12:30 - 13:30	ALIGNING THE INTERESTS OF INVESTORS AND FUND MANAGERS <ul style="list-style-type: none">• Market Challenges and Fund Performance• Deal Flow and Fees• Funds on the road – the challenges GPs face from the perspective of investors Chair: Judith Donnelly, Partner, Clyde & Co. Zach Mecelis, Managing Partner, CEO, Covalis Capital Ian Berry, Fund Manager, Infrastructure and Renewable Energy, Aviva Investors Dhruv Sharma - Director, Asset Selection, Strategic Asset Partners Marie Fitzpatrick, Business Development Director, Langham Hall
13:30 - 14:30	NETWORKING LUNCH
14:30 - 14:50	MODERATING AND REALLOCATING RISK TO MATCH INVESTOR PORTFOLIOS Toby Buscombe, CFA, Principal, Head of Infrastructure, Mercer
14:50 - 15:30	UNLISTED VS LISTED INFRASTRUCTURE INVESTMENT <ul style="list-style-type: none">• Infrastructure as a Tool for Diversification – What are LPs Looking for?• Advantages of Listed Infrastructure Funds• State of the Unlisted Infrastructure Market Andrew Charlesworth, Director, John Laing Capital Management Ltd Zack Mecelis, Managing Partner, CEO, Covalis Capital Boe Pahari, Managing Director Europe, AMP Capital



GIIS 2014 PROGRAMME

15:30 - 15:50 NETWORKING COFFEE BREAK

15:50 - 16:40 CHALLENGES OF BUILDING AND MAINTAINING A SUCCESSFUL INFRASTRUCTURE INVESTMENT PORTFOLIO

- Finding value in an overcrowded market
- Strategies for diversification to create an accelerated cash flows
- Secondary markets – offsetting blind pool risk and J curve effect

Chair: Jean-Francis Dusch, MD, Head of Infrastructure & Structured Finance Advisory, CBR – Edmond de Rothschild Limited

Andrea Echberg, Head of Infrastructure Investment, Pantheon
Verena Kempe, Director, Private Equity, Feri Trust GmbH
Lin O’Grady, Deputy Director, EBRD

16:40 - 17:40 RENEWABLE ENERGY ASSETS PERFORMANCE COMPARED TO TRADITIONAL INFRASTRUCTURE ASSETS

- How can LPs successfully navigate the complex market of renewable energy?
- Where are the best opportunities?
- The role of public-private instruments to reduce cost of capital and risk exposure

Scott Mackin, Co-President and Managing Partner, Denham Capital
Michael Barrow, Deputy Director General, Asian Development Bank
Martin Mainz, Vice President, Strategic Projects, DEG Invest
Olivia Breese, Senior Transaction Manager, DONG Energy Wind Power

17:40 - 19:00 CHAMPAGNE RECEPTION

Please note that the timing of the presentation slots are not fixed, and are shown as a guideline only. This is a preliminary programme. The organisers reserve the right to make limited, but not overall changes to the agenda, replacing/substituting speakers and altering themes.

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