

SESSIONS

MAIN CONFERENCE DAY ONE - 04/06/2024

SuperReturn Energy Transition

4 - 5 June 2024

Hilton Berlin
Berlin

Registration and morning networking coffee

08:15 - 09:00

Main Conference Day One

Chair's opening remarks

09:00 - 09:05

Main Conference Day One

Participants

Bill Kelly - CEO, CAIA

Defining energy transition

09:05 - 09:40

Main Conference Day One

What does energy transition mean for the investment community? Is it an ideological, technical, economic or a political matter? Sharing examples of successful strategies to get the most bang for your buck. What asset allocation pot does energy transition belong to? What are the key opportunities and risks investors and developers need to consider?

Participants

Mariam Akanbi - General Counsel, ARCH Emerging Markets Partners

Lucy Heintz - Partner, Head of Energy Infrastructure, Actis

Juergen Pinker - Senior Managing Director, Blackstone

Chris Rozzell - Managing Partner, Cresta Fund Management

Ken Pontarelli - Global Head of Sustainable Investing, Goldman Sachs Asset Management

Opportunities in distributed solar power generation in the U.S. and Europe

09:40 - 10:00

Main Conference Day One

Participants

Will Morgan - Managing Director, Europe, True Green Capital Management LLC

Macro-economic overview: how are we coping?

10:00 - 10:30

Main Conference Day One

Exploring the global impact of IRA and upcoming US elections. How have the rising costs for alternative energy production, inflation, supply chain issues and high interest rates affected the returns? How in line are we with the goals for achieving net zero by 2050? What could be the economic and social costs of pushing for "too fast" of an energy transition? Discussing key take-aways and action points post COP-28.

Participants

Moderator: Kelly DePonte - Managing Director, KD Advisory LLC

Siddharth Kumar - Director, IMPERIUM Capital

Nazo Moosa - Managing Partner, Energy Impact Partners

Eric Danziger - Managing Director - Energy Transition, Riverbend Energy Group

Networking coffee break

10:30 - 11:00

Main Conference Day One

Renewables: going through a test of resiliency

11:00 - 11:40

Main Conference Day One

Where do renewables stand on the investability scale? Exploring trends around the renewable fuel landscape. How do market players navigate the challenges associated with offshore wind? Achieving higher returns by investing in renewables: perspectives from private and public markets.

Participants

Vasishta Dasari - Principal, Partners Capital LLP

Recep Kendircioglu - Global Head of Infrastructure Equity, Manulife

Ignacio Paz-Ares Aldanondo - Managing Partner, Renewable Power & Transition, Brookfield Asset Management

Florian Küster - Partner, Copenhagen Infrastructure Partners

Mike Roth - Partner, Infrastructure Opportunities, Ares Management

Unlocking the investment potential of hydrogen

11:40 - 12:10

Main Conference Day One

What are the key advantages and risks of hydrogen compared to other energy sources? Looking at hydrogen as a commercially viable pathway to a lower-carbon future. Hydrogen as a transportation fuel. What is needed to establish the wider infrastructure and supply chains required for hydrogen-powered vehicles? Debate: blue vs. green hydrogen: which will the market choose?

Participants

Peter Flynn - Director, Candela Capital

Igor Lukin - Managing Partner, Allianz Capital Partners

Scott Browning - Partner, Sustainability and Infrastructure Group, Apollo Global Management

Chris Holmes - Partner, Foresight Group

Jacqueline van den Ende - CEO, Carbon Equity

Calling on nuclear power as a tool for decarbonisation

12:10 - 12:40

Main Conference Day One

Exploring the potential, current demand and the future of nuclear energy. How do you invest in nuclear power? Sharing the perspectives of PE, PC players and developers on investing and lending to nuclear energy projects. Is now a good time for investors and developers to engage in Micro and Small Modular Reactor (MSMR) projects?

Participants

Moderator: John Chaplin - Vice President - Commercial, Last Energy

Hossein Nouri - Managing Director, Petro Power Construction Ltd.

Mike Scott - Managing Partner, Founder, Pelican Energy Partners

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Electrification: global investment opportunities and risks

12:40 - 13:10

Main Conference Day One

Moving from gas to electric heat pumps and switching to lower intensity fuels and carbon capture storage – at what pace is this going to happen? Electrifying manufacturing processes: how expensive is it and what is the transition scenario? Is this a long-term or a short-term market trend? Electrification and the grid: exploring the growing pains and hurdles related to infrastructure build-out. What are the investment challenges and opportunities on the EV side?

Participants

Moderator: Alex O'Cinneide - CEO, Gore Street Capital

Sarah Lane - Managing Director, Denham Capital

Brian Wayne - Managing Partner & Co-Founder, CurvePoint Capital Management

Sam Stoutner - Partner, NGP Energy

Pierre Abadie - Group Climate Director and Co-head of the Private Equity Decarbonisation Strategy, Tikehau Capital

Networking lunch break

13:10 - 14:10

Main Conference Day One

Women in Energy lunch

13:10 - 14:10

Women in Energy lunch

For Women in Energy lunch, please register with svetlana.fathers@informa.com

Oil & Gas: a shift in perception?

14:10 - 14:40

Main Conference Day One

Evolution of the role, risk/return profile and value-add opportunities of oil & gas. Debating the future of oil and gas demand, what it means for climate and for investments in technologies that would offset emissions. How has the exit market for oil & gas investments changed and how are investors adapting? Can oil & gas and ESG-focus co-exist?

Participants

Hossein Nouri - Managing Director, Petro Power Construction Ltd.

Mike Scott - Managing Partner, Founder, Pelican Energy Partners

Barrett Miles - Director, Private Real Assets, Apogem Capital

Andrew Evans - Managing Director, ARC Financial Corp.

Defining energy pathways

14:40 - 15:00

Main Conference Day One

Participants

Jeff Currie - Chief Strategy Officer of Energy Pathways, The Carlyle Group

Natural gas: a critical part of the energy transition

15:00 - 15:30

Main Conference Day One

How can the energy transition process the LNG market in terms of volume and price? Geographical analysis of market and policy dynamics affecting the ways in which coal and gas compete. The environmental case for building new gas infrastructure. Exploring potential sources of future natural gas supply and demand on a global basis.

Participants

Paul Colucci - Managing Partner, PillarFour Capital

Art Robinson - Managing Director, Longbow Capital

Erik Belz - President & Chief Operating Officer, Engine No.1

Emily Simonis - Managing Director, LS Power

How to invest in energy transition: Part One

15:00 - 15:30

LP-only closed-door session

What new energy transition investment strategies are most appealing to LPs? Exploring the most commercially viable options for those investors who have already embraced renewables, but also seek exposure to fund the wave in energy transition? What is the most perfect balance in the investment portfolio between renewables and traditional energy assets? Should transition investments be measured using the same risk-return metrics as traditional energy investments?

This exclusive discussion group is open to 20 to pre-registered development finance institutions, endowments, foundations, insurance companies, pension funds and sovereign wealth funds, subject to qualification. Run under the Chatham House Rule. To register, please contact: Eva.Zhang@informa.com

Participants

Discussion leaders: Siddharth Kumar - Director, IMPERIUM Capital

Mr Ajay Ramachandran - Co-Chair, Kutsa Foundation

Networking coffee break

15:30 - 16:00

Main Conference Day One

Energy storage, transmission and distribution

16:00 - 16:35

Main Conference Day One

Investing in the new infrastructure to support transmission and distribution of power. An overview of grid stability and reliability, emerging long-duration energy storage technologies to support the widescale deployment of renewable energy sources. Battery storage in the spotlight: production, supply chain and a future investment trajectory. What key opportunities can battery Giga-factories provide for the future? The importance of Smart grids.

Participants

Johanna Holmström - CIO/Co-Founder, Nordic Node

Marek Wolek - Chief Strategy Officer & Head of M&A, Fluence

Anne Foster - MD, Global Head of Sustainability and Impact Investment, Quinbrook Infrastructure Partners

Emmanuel Lagarrigue - Partner, KKR

Distributed power generation: enabling the move to green energy worldwide

16:35 - 17:05

Main Conference Day One

Exploring the advantages, benefits, environmental impact and the future of distributed power generation. What types of DG attract the most interest from investors? The opportunity for global distributed solar power generation: geographical comparison. Exploring the role of renewable hydrogen in DG: a case study for investable opportunities.

Participants

Moderator: Alexandre Tilmant - Head of Corporate Development, Blueprint Power

Izzet Bensusan - Managing Partner and Founder, Captona

Jackie Forrest - Executive Director, ARC Energy Research Institute

Dan Erhardt - Founder and CEO, Arcus Power

Carbon dioxide removal: investing now to close the carbon gap

17:05 - 17:25

Main Conference Day One

By 2050, the world will need 5-10 billion tonnes of CO2 removed from the atmosphere annually. Early investment in a broad range of solutions today can unlock planetary scale and the opportunity to capitalise on the exponential growth the carbon removal industry promises.

Participants

Mr Andrew Shebbeare - Managing Partner, Counteract

Chair's closing remarks

17:25 - 17:30

Main Conference Day One

Participants

John L. Bowman - President, CAIA Association

Networking drinks reception

17:30 - 19:00

Main Conference Day One

SCHEDULE

MAIN CONFERENCE DAY ONE - 04/06/2024

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TIME	MAIN CONFERENCE DAY ONE	WOMEN IN ENERGY LUNCH	LP-ONLY CLOSED-DOOR SESSION
08:00	08:15 - Registration and morning net-working coffee		
09:00	09:00 - Chair's opening remarks 09:05 - Defining energy transition 09:40 - Opportunities in distributed solar power generation in the U.S. and Europe		
10:00	10:00 - Macro-economic overview: how are we coping? 10:30 - Networking coffee break		
11:00	11:00 - Renewables: going through a test of resiliency 11:40 - Unlocking the investment poten-tial of hydrogen		
12:00	12:10 - Calling on nuclear power as a tool for decarbonisation 12:40 - Electrification: global investment opportunities and risks		
13:00	13:10 - Networking lunch break	13:10 - Women in Energy lunch	
14:00	14:10 - Oil & Gas: a shift in perception? 14:40 - Defining energy pathways		
15:00	15:00 - Natural gas: a critical part of the energy transition 15:30 - Networking coffee break		15:00 - How to invest in energy transition: Part One
16:00	16:00 - Energy storage, transmission and distribution 16:35 - Distributed power generation: en-abling the move to green energy world-wide		
17:00	17:05 - Carbon dioxide removal: investing now to close the carbon gap 17:25 - Chair's closing remarks 17:30 - Networking drinks reception		

SESSIONS

MAIN CONFERENCE DAY TWO - 05/06/2024

SuperReturn Energy Transition

4 - 5 June 2024

Hilton Berlin
Berlin

Registration and networking coffee

08:00 - 09:00

Main Conference Day Two

LP-only breakfast

08:00 - 09:00

LP-only closed-door session

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Chair's opening remarks

09:00 - 09:05

Main Conference Day Two

Participants

John L. Bowman - President, CAIA Association

Investing in energy efficiency

09:05 - 09:40

Main Conference Day Two

Who invests in energy efficiency, and why does it matter? Examining the barriers to increasing investment and financing flows to energy efficiency projects. Sharing advice on how to overcome the hurdles and ways to increase energy efficiency project investment viability. Upfront costs, long-term savings, tax credits and other considerations.

Participants

Jackie Forrest - Executive Director, ARC Energy Research Institute

Pierre-Antoine Machelon - Managing Director, Eiffel Investment Group

Laurent Kraif - CEO, Perfesco

Adam Hanover - Co-Founder and CEO, Union Main Group

Topic TBC

09:40 - 10:00

Main Conference Day Two

The impact of climate change on renewable infrastructure returns

10:00 - 10:20

Main Conference Day Two

Exploring the systematic effects of climate change on investor perception. Sharing practical examples of climate impact on renewable energy asset class: how does it influence productivity, risks and opportunities at the asset level?

Participants

Laura Noorani - Principal, Hambro Perks

Josh Gilbert - CEO and Co-Founder, Sust Global

Sharing an LP sentiment on investing in energy transition

10:20 - 11:00

Main Conference Day Two

What do LPs view as a more financially beneficial investment decision based on their risk/return profiles: traditional energy, renewables or energy transition? What is the LPs' primary guiding investment strategy and fiduciary financial view: getting the best value for money or environmental considerations? Is the ability to deploy capital toward attractive transition investments becoming easier or more challenging?

Participants

Kostis Tselenis - Managing Partner, Swiss Impact Office

Matteo Squilloni - Head of Climate Transition – Equity Investments, European Investment Fund

Charlotte Daelemans - Managing Director & Senior Real Asset Specialist, Nuveen

Ulla Frimor Agesen - Head of Infrastructure, Nordic Investment Opportunities

Uwe Fleischhauer - Founding Partner and Member of the Executive Board, YIELCO Investments

Networking coffee break

11:00 - 11:30

Main Conference Day Two

Energy transition private markets update

11:30 - 11:45

Main Conference Day Two

Where is the capital being raised and deployed across the energy sector? What sectors are managers prioritising? Which markets offer the best prospects for deals and return generation?

Participants

Alex Murray - Vice President of Research Insights, Preqin

An overview of risks and opportunities: GP perspective

11:45 - 12:30

Main Conference Day Two

What is considered to be a more forward-thinking investment approach amongst GPs to accelerate global decarbonisation at a sufficient pace? GPs on dealing with an increased competition from new market entrants and consolidation? What are the most reliable sources of financing energy transition projects? Showcasing the most effective ways for fund managers to approach potential investors to raise capital.

Participants

Vasishta Dasari - Principal, Partners Capital LLP

Ruperto Unzue - Partner, Suma Capital

David Halkyard - Partner, Head of Credit, Resource Capital Funds

Scott McMurtry - Managing Director, Apollo Global Management

Private debt filling in the gap

12:30 - 13:00

Main Conference Day Two

How have sustainable private credit and bond strategies evolved compared to conventional financing, such as project financing and debt security? Is the access to debt and getting better or worse? Are banks lending directly to companies, and under what terms? How does it impact returns and the ability to get projects financed? How have terms and covenants evolved during the recent central bank tightening cycle?

Participants

Severin Hiller - Partner & Co-Head of Credit, Qualitas Energy

Don Dimitrievich - Senior Managing Director and Portfolio Manager, Energy Infrastructure Credit, Nuveen

Prasad Gadkari - Executive Director and Chief Strategy Officer, National Investment and Infrastructure Fund (NIIF)

Kees-Jan Vvan de Kamp - Executive Director, Alternative Credit | Infrastructure Debt, Goldman Sachs Asset Management

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How to invest in energy transition: Part Two

14:30 - 13:00

LP/GP closed-door session

[LP/GP closed-door session]

Due diligence amid the transition. Are areas of focus for LPs different when it comes to emerging managers, especially if they have a fiduciary duty, and what do emerging GPs think they need to focus on? What do investors weigh up when looking at energy transition-related funds? Do LPs get exposure to this sector from infrastructure funds, or do they make a separate allocation to pure-play energy transition funds? What is the remit of new Climate funds? How are GPs innovating their strategies to appeal to investors?

To sign up, please contact:

svetlana.fathers@informa.com

Participants

Discussion leader: Suhrid Mantravadi - Partner, Grey Rock Investment Partners

Nina Kraus - Principal, Fund Investments, Hamilton Lane

Networking lunch break

13:00 - 14:00

Main Conference Day Two

ESG considerations in energy transition

14:00 - 14:40

Main Conference Day Two

Exploring the link between ESG and the cost of capital. How ready and prepared are we for ESG reporting regulations? Discussing the relevance of EU taxonomy and SFDR regulations. What is the role of carbon markets? What are the key ESG considerations and concerns during fundraising for both fund managers and institutional investors? Addressing an issue of box-ticking and greenwashing.

Participants

Moderator: James Boakes - Senior Impact Investment Analyst, Mercer Alternatives

Raphaella Schmid - Head of ESG & Sustainability, SUSI Partners

Ethan Levine - Managing Director, CF Private Equity

Paul Newsome - Partner, Head of Portfolio Management, Unigestion

Keeping up with evolving values of DE&I

14:40 - 15:10

Main Conference Day Two

Attracting and retaining talent as a critical source of competitive advantage. What skills are needed for the energy industry workforce of the future? How can the industry attract next-generation workers? Sharing best practices on ensuring an all-inclusive and diverse workforce.

Participants

Laura Merlini - Managing Director, EMEA, CAIA Association

Rahul Advani - CEO & Managing Partner, SER Capital Partners

Eleanor Blagbrough - Co-Founding Partner, Blume Equity

Networking coffee break

15:10 - 15:40

Main Conference Day Two

Geographic comparison: where do we find returns?

15:40 - 16:15

Main Conference Day Two

Analysing the performance of key economic regions in the race towards net zero future and the rate energy transition technologies are being adopted. Has the effect of IRA on capital deployment skewed capital allocation towards the US market and away from Europe? Funding energy transition in emerging markets: an overview of the latest developments, challenges and investment opportunities. Exploring strategic shifts in capital allocation influenced by global policies and the unique position of emerging markets.

Participants

Maria Sanz - Managing Director and Private Equity Co-Head, YIELCO Investments

Isabella da Costa Mendes - Founding Partner and co-CEO, ImpactA Global

Tove Larsson - General Partner, Norrsken VC

Matt Cuning - Vice President, Longbow Capital

Alexander Romanishyn - Former Deputy Minister of Economy of Ukraine, Strategy Director, Razom We Stand

Levelized costs of electricity as an indicator of cost-effectiveness

16:15 - 16:35

Main Conference Day Two

Why is LCOE Important and what does it mean for energy project stakeholders? How can LCOE factor into your financing strategy?

Participants

Luigi Pettinichio - Co-Founder and CEO, Asper Investment Management

In conversation with: Francesco Cacciabue - Global Head of Clean Energy Investments, Nuveen Infrastructure

Geopolitics at the forefront of energy transition

16:35 - 17:00

Main Conference Day Two

Exploring the key drivers of the global energy transition and the way they shape energy systems, markets and trade flows, industrial and security policies. What new possibilities and challenges await us? Will the transition pacify or politicize global energy relations? And how will this affect investment opportunities and risks?

Participants

Daniel Scholten - Visiting Assistant Professor at the Center for Science, Technology, and Environmental Policy, Humphrey School of Public Affairs, University of Minnesota

Decarbonisation of the Transport sector

17:00 - 17:30

Main Conference Day Two

Examining government commitments and private sector actions that are needed to decarbonise the transport system. What can be done to accelerate progress? Sharing best practices that will accelerate the transition to carbon-neutral mobility. Looking at costs and efficiencies of transport electrification options. BEVs, Hydrogen, biofuel, renewable natural gas, renewable liquid fuel: uncovering the full potential of new technologies.

Participants

Paul Jordan - Principal, Activate Capital

Paul Kaboub - Partner & Co-Founder, Inyarek Partners

Alastair Maxwell - Chief Financial Officer, C2X

Mr Florent del Picchia - Head of Euro Infrastructure Debt, Aviva Investors

Chair's closing remarks

17:30 - 17:35

Main Conference Day Two

SCHEDULE

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17:00	17:00 - Decarbonisation of the Transport sector 17:30 - Chair's closing remarks		