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34th Annual
Global Power Markets™ Conference
The Premier Conference for Power Investors and Developers
April 8-10, 2019 | Wynn Las Vegas | Las Vegas, Nevada

Where energy transfers.
Delivering essential information about the transformation of power markets:

- **Global power**: What growth can we expect in global renewables? Will merchant renewables take off in Europe and globally?
- **North American power**: Regional market overviews—load, capacity, and fuel expectations
- **Emerging power market investment**: Africa, Europe, Latin America, and Mexico
- **The future of AI and financials**: Impacts on internal operations and investment decisions
- **Digitalization**: How blockchain technology can change the way the grid is managed
- **Which electric power technologies have the greatest growth opportunities?**: Looking at utility scale solar, energy storage, and offshore wind
- **Project finance**: Financing renewable projects with short offtakes, merchant tails, and below investment grade PPAs
- **Global electric vehicle outlook**: Implications for US and global power

Where energy builds.
Featured Keynote address:
Building the future of energy in the face of “creative destruction”

Tom Fanning,
Chairman, President and CEO,
Southern Company

More speakers you will meet:
- Laura Beane, Avangrid Renewables
- Michael Storch, Enel X North America Inc.
- Adam Broun, Kensho Technologies
- Steve Winn, JERA
- Cameron Briggs, Origin Energy
- Florian Andreas Kolb, Innogy New Ventures
- William Gerald Demas, Copenhagen Infrastructure Partners
- Priyanka Kandula, Onyx Renewable Partners
- Jay Horine, JP Morgan
- and many more, see inside for full agenda

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Where energy illuminates.

Pre-Conference Workshop: North American Power and Natural Gas Fundamentals and Projections

A pre-conference workshop designed for better decisions.

Attend the pre-conference North American Power and Natural Gas Fundamentals Workshop to learn about the key aspects of natural gas production, storage, and demand impacting power investment and generation. Especially ideal for banks and other financial institutions, energy end-users, energy traders, and analysts.

Day 1: Monday, April 8, 2019

2:00 Pre-Registration for Workshop Attendees Only

2:30 Upstream Natural Gas Fundamentals
- Gas production is still surging after bottoming in late 2016
- How much of a slowdown looms?
- Which basins will drive growth over the next five years?
  Kevin Sakofs, Senior Analyst, Americas Natural Gas, S&P Global Platts

3:00 Midstream Natural Gas Fundamentals
- Northeast pipeline expansions: Too much of a good thing or not enough?
- Is the Permian the new Northeast? A lack of pipeline capacity is making it difficult for Permian gas to find a home
- Reaching Henry Hub: The “last mile” challenge
  Anne Swedberg, Manager, Americas Natural Gas, S&P Global Platts

3:30 Downstream Natural Gas Fundamentals
- US to become a major gas exporter, but exposure to policy and price risks is rising
  • US LNG export capacity is set to more than double by 2020
  • US exports to Mexico could also double as new domestic infrastructure is completed
- Has power demand peaked or does a second wave of strong growth loom?
  • More gas-fired plant development and nuclear/coal plant retirements are set to increase the amount of natural gas used for power generation
  • Will lower prices yield heavier utilization of the gas fleet in the near-term?
  Beth McKay, Manager, Americas Natural Gas, S&P Global Platts

4:00 Networking & Refreshment Break

4:15 The Future of North American Electric Power and Generation Investment
- State policy with respect to greenhouse gas emissions and renewables targets are causing regional power markets to diverge: Where are the best opportunities for investment?
- Falling costs for renewables and storage and supportive policy have shifted the competitive landscape for generation despite headwinds at the federal level
- Whether from increased contracting activity or expansion of RTO footprints, market access has been key to expanding generation investments: Which regions show the most promise in 2019?
- This past summer, Texas met record peak demand with unusually low reserves on hand: Is generation oversupply even worse than we thought?
- Upstream natural gas supplies are showing some signs of tightening: Can gas-fired generation demand lead a surge in prices?
  Morris Greenberg, Managing Director, Global Power, S&P Global Platts
  Steve Piper, Research Director, Energy, S&P Global Market Intelligence

5:00 The Future of North American Natural Gas
- The size of the US market has finally surpassed 30 trillion cubic feet (Tcf). The underlying structural changes that have allowed the market to expand include gains from not just domestic demand but exports, too. Moreover, resources suggest the potential for further gains capable of supporting more than a 40 Tcf market.
- Risks on both supply/demand fronts, though, are plentiful with potential profound price implications
  Richard M. Redash, Head of Research, North American Gas & Power Analytics, S&P Global Platts

5:30 Close of Workshop

6:00 Welcome Reception and Registration

Hosted by: WILMINGTON TRUST

7:30 Close of Day One
Global Power Markets™ Conference

Day 2: Tuesday, April 9, 2019

7:15 Registration and Networking Breakfast
Hosted by: Fidelity National Title Insurance Company

8:15 Welcome and Opening Remarks from the Conference Chairman
Todd Filsinger, Managing Director and Owner, Filsinger Energy Partners

8:30 KEYNOTE ADDRESS Building the Future of Energy in the Face of “Creative Destruction”
Tom Fanning, Chairman, President and Chief Executive Officer, Southern Company

9:00 Global Power Outlook
- North America
  - Regional market overviews: Load, capacity, and fuel expectations
  - What about reserve margins? (ERCOT in summer 2018, in 2019)
  - Nuclear at risk, opportunity for others?
  - Longer term scenarios: “Low gas price”, “black Trumps green”
  - New state clean power goals in CA, NY, IL, elsewhere?
  - Market design changes in New England, NY, PJM, ERCOT
- Global Power
  - European outlook: What will replace retiring nuclear and fossil fuel units?
  - What growth can we expect in global renewables?
  - Will merchant renewables take off in Europe and globally?
  - What’s the future of nuclear?
  - Is the window closing for coal in China?
  - Global gas demand: Will it come from the power sector or elsewhere?
  - What are the opportunities in a low-carbon future, and where?
  - Global electric vehicle outlook: Implications for US and global power
Roman Kramarchuk, Managing Director, Policy, Technology, and Scenario Planning, S&P Global Platts
Bruno Brunetti, Managing Director, Global Power, S&P Global Platts

9:45 Networking & Refreshment Break
Hosted by: BLACK & VEATCH

10:15 PANEL DISCUSSION Global Power Markets Executive Roundtable
- Progression of the resource mix amid a tense political/geopolitical climate
- Utility of the future: How soon will new technologies, business models, and competitive threats permanently change the way the electric power sector does business?
- Electrification of transportation and other energy end-use sectors: More pathways forward to decarbonization
- The next 5 years in energy storage: What can we expect?
- Emerging power markets investment and growth opportunities
Moderator: Jeremy Fago, US Power & Utilities Deals Leader, PwC
Laura Beane, President and Chief Executive Officer, Avangrid Renewables
Michael Storch, President and Chief Executive Officer, Enel X North America Inc.
Paul F. Browning, President and Chief Executive Officer, Mitsubishi Hitachi Power Systems Americas

11:30 PANEL DISCUSSION Global Renewables and Clean Technology Investment
- Global solar
  - Where are module prices headed and what can we expect for total LCOE of utility-scale solar?
  - Impact of Trump tariffs, Chinese solar policies, and Indian tariffs
  - Looking beyond traditional markets: Which markets see the largest growth ahead?
- Storage and batteries
  - Other than lithium-ion, is there a space for other technologies?
  - What are the prospects of storage plus solar?
- Offshore wind
  - Developments that are making offshore wind attractive in the US market
  - How is the project finance community bracing itself for sector take-off?
  - Wind developments in Europe: What key lessons can apply in other markets?
- Decarbonization, decentralization, digitalization
  - What are key drivers for innovation in generation, distribution, and sales?
What does IoT mean for the value proposition of distributed energy systems?
How can blockchain technology change the way the grid is managed?

Alexander Krolick, Managing Director Infrastructure and Energy Group, Macquarie Capital
Florian Andreas Kolb, Managing Director, Innogy New Ventures LLC
William Gerald Demas, Executive Director, Copenhagen Infrastructure Partners
Arnon Klein, Senior Investment Director, John Laing
Cameron Briggs, General Manager, Future Energy, Origin Energy

12:45 Networking Luncheon
Hosted by: nodal
Fireside chat: The Future of AI and Financials
Nick Cafferillo, Chief Data and Technology Officer, S&P Global
Adam Broun, Chief Executive Officer, Kensho Technologies

2:15 PANEL DISCUSSION Global Investment in Emerging Power Markets—Africa, Latin America, and Mexico
- Mexico: Next steps in energy reform, renewables/natural gas mix, auctions versus private PPAs, and new financial instruments enabling local pension fund investments
- Africa: Development, financing, construction, and exit strategies for long-term contracted renewable assets
- Chile: PPA pricing and risks for utility-scale renewables, investor nuances, small utility-scale solar, and merchant risks
- Brazil: Post-election impacts—Is the market more investor-friendly?
- The more active investor management role as shorter-term and structured PPAs become standard
Moderator: Bradley G. Barta, Vice President, Leidos
Adi Blum, Managing Director, Global Energy and Power, Blackrock
Saurabh Anand, Managing Director, Denham Capital
Fernando Ferreyra, Vice President, International Development, Invenergy LLC
Brad Leufkens, Senior Principal, Infrastructure & Natural Resources, Ontario Teachers’ Pension Plan
Pablo F. Lutereau, Managing Director, Head of Infrastructure, Latin America, S&P Global Ratings

3:30 Networking & Refreshment Break
Hosted by: BLACK & VEATCH

4:00 PANEL DISCUSSION Power M&A Developments—Rationalizing Portfolios, Evolving Business Models
- The complex deal environment: Changing generation mix and a growing appetite for renewables
- Decarbonization: Exploring battery storage, electric vehicle infrastructure, and digital grid technologies
- Non-conventional competitors
- Emergence of developing markets as an investment destination for traditional M&A
- Developers selling down to passive investors
Moderator: Elaine Walsh, Partner, Baker Botts LLP
Jay Horine, Global Head of Energy Investment Banking, JP Morgan
Ray Henger, Chief Development Officer, sPower
Priyanka Kandula, Vice President, Strategy (M&A), Onyx Renewable Partners L.P.
Steve Winn, Chief Development Officer, JERA

5:15 Global Power Markets™ Reception
Hosted by: SIEMENS

6:15 Close of Day Two

Day 3: Wednesday, April 10, 2019

8:00 Networking Breakfast
Hosted by: EnergyServices

8:45 Chairman’s Review of Day Two

9:00 PANEL DISCUSSION US Power Market Reform: New Directions in Regulation by the States and FERC
- DOE’s policy moves to support resilience with coal and nuclear: What’s the likely path?
- ISO-NE’s capacity market reform (CASPR) to accommodate subsidized generation
- PJM’s attempts to accommodate subsidized resources
- ERCOT market reforms: Progress on the NRG/Calpine proposal
- FERC Order 841: What are the implications of accommodating storage resources in wholesale power markets?
- CAISO: Ensuring resource adequacy in a low or zero carbon grid

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Moderator: Ken Irvin, Partner, Sidley Austin LLP
Abe Silverman, Vice President, Regulatory Affairs Group and Deputy General Counsel, NRG Energy
W. Mason Emnett, Vice President, Competitive Market Policy, Exelon
Sarah Novosel, Senior Vice President, Government Affairs, Calpine Corp.

10:15 Networking & Refreshment Break
Hosted by: BLACK & VEATCH

10:45 PANEL DISCUSSION Project Finance Trends
- Financing renewable projects with short offtakes, merchant tails, and below investment grade PPAs
- Diligence trends for large portfolios: Are IEs evaluating every project? Are lawyers reviewing every project agreement?
- How are buyers getting comfortable with DG portfolios with so many small assets?
- Buying post PPA/merchant projects: Frameworks being used to size debt against varying production, uncertain pricing, and rapidly changing markets

Vimal Chauhan, Managing Director, US Power, GE Energy Financial Services
Hadley Peer Marshall, Managing Director, Brookfield Asset Management
Andrew Rosenbaum, Managing Director, Power & Utilities, BMO Capital Markets
Aneesh Prabhu, Senior Director, Global Infrastructure, S&P Global Ratings
Jonathon Kaufman, Managing Director, Credit Suisse

Ground Your Portfolio
How are you supporting your business strategy the rest of the year? Plug into Platts North American Electricity Analytics service to:

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12:00 Close of Conference
Agenda subject to change.
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Global Power Markets™ Conference


For the past 33 years, we’ve been helping constituents from across the power investment and development sectors come together. It’s an annual event they look forward to all year long.

Everyone from CEOs to consultants are at the conference, and they’re all interested in making deals. This year we’re rolling out exciting new technology to help you find and engage the right people, plan your time, and manage your contacts.

There’s no limit to the potential.


Our past attendees say it best:

“The conference is really the premier networking event. They’ve got great speakers so you can hear what people are thinking, spark some conversations, but in the meantime, it’s all about the people who are here talking to folks. If you’re in the business of doing deals, whether it’s buying a plant, selling a plant, financing a plant, this is where everybody is.”

“If you are a banker to the industry, if you’re a lender to the industry, if you’re a consultant, lawyer, accountant, this is where you’re going to find the decision-makers. Those that are doing deals, building facilities, buying facilities—that really need all those services. This is the place to come if you really want to get exposure to the industry leaders.”

“This conference has three things going for it that most others don’t: 1) it’s an amazing unique networking opportunity because of the critical mass of key decision-makers; 2) the program is very timely with topics not only about US markets but also what’s happening elsewhere around the world; and 3) last but not least, it’s a discussion forum with key decision-makers, investors, lawyers, and financial folks. It’s a combination of the program and participants that you don’t see anywhere else.”
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