SESSIONS
INTRODUCTION TO AIRPORT BUSINESS AND FINANCE SEMINAR - 11/11/2019

Registration & coffee
09:30 - 09:45

Introduction to the aviation industry
09:45 - 10:30
Seminar
How does aviation perform in relation to global economic and socio-political trends, what risks do airport investors and operators need to watch out for and what opportunities?

Participants
Speaker: James Halstead - Partner, Aviation Strategy

Understanding the airport business model
10:30 - 11:15
Seminar
• Deconstructing costs and operating expenses
• Revenues: aeronautical vs non-aeronautical
• Benchmarking yield from different airline and revenue strategies
• What is financial success in an airport context?

Participants
Speaker: Jean-François Guitard - Director, International Development, Aeroports De La Cote D'Azur

Networking and refreshments break
11:15 - 11:45
Seminar

The economic regulation of Airports 101
11:45 - 12:25
Seminar
• Comparing economic regulatory regimes - their incentive for investment and financing, how they promote competition and consumers’ interests and the weight of the regulatory burden.

Participants
Speaker: Andy Ricover - Specialist, Air Transport

Airport charges and pricing
12:25 - 13:00
Seminar
How are charging structures changing and what impact is this having in yield per passenger. What are the considerations for negotiating with airlines?

Participants
Speaker: Nigel Mayes - Senior Vice President, ASM World Route Development Consultants

Lunch
13:00 - 14:00
Seminar

Demystifying airport development finance and investment models
14:00 - 15:15
Seminar
• What do the acronyms really mean - PPP, BOT, BLT, DBFOT, OMT DBC – ETC!
• How does risk transfer work?
• Comparing and contrasting different airport ownership and capital structure models

Participants
Speaker: Curtis Grad - President & CEO, Modalis Infrastructure Partners

Networking and refreshments break
15:15 - 15:45
Seminar

Financial planning, CAPEX projects and ROI
15:45 - 16:45
Seminar
• Identifying opportunities to ensure assets are well managed in support of short-term strategic goals.
• Capital planning: strategies for managing, directing, and controlling the efficiency and effectiveness of capital resource over the life-cycle of the airport business
• Understanding the role of the financial investor in supporting airport development efforts whilst achieving shareholder return-on-investment obligations
• How to balance the requirements of public stakeholders, private investors, airline efficiency requirements and the cost to the passenger.

Airport valuations and profitability
16:45 - 17:15
Seminar
How much is your airport worth? How profitable is the sector these days and how is successful economic impact measured?
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SESSIONS
GAD WORLD 2019 - DAY 1 - 12/11/2019

Registration and coffee
08:00 - 08:45

Opening and welcome
08:45 - 09:00
State of the Industry plenary sessions

The Global Airport Development "State-of-the-Industry" Q&A
09:00 - 09:45
State of the Industry plenary sessions
- How is the current financial, political and social climate shaping strategic priorities?
- How are market leaders evolving their models to capture different opportunities?
- What are the strategic priorities for investors and operators?

Participants
Panellist: John Bruen - Senior Managing Director (MIRA), Head of Transport Europe, Macquarie Infrastructure and Real Assets (Europe)

IATA Aviation market briefing
09:45 - 10:15
State of the Industry plenary sessions
How are aviation businesses performing, where can we look for traffic growth and improved profitability, under the threat of an economic downturn?

Participants
Speaker: Brian Pearce - Chief Economist, IATA

Financing airport investment in an uncertain climate
10:15 - 11:00
State of the Industry plenary sessions
How is the new growth paradigm and the increasing pace of change impacting development strategy, financial planning and return expectations?

Participants
Panellist: Ray Gray - Group CFO, daa plc
Panellist: Jantine van der Meijs - CFO & Executive Vice President, Royal Schiphol Group

Refreshments and 1-2-1 networking meetings
11:00 - 11:30
State of the Industry plenary sessions
Use the new Brella app to identify and approach new contacts, set up introductory meetings in the dedicated 1-2-1 networking area.

The 2019 economic outlook: what will be the impact on passenger spending and airport finance?
11:30 - 12:00
State of the Industry plenary sessions
Our 2019 guest economist is an expert on the intersection between economics, social behaviour and cultural perceptions. Merryn Somerset Webb will take a closer look at the current economy, debt and inflation and consider how the environment will impact airport financing and consumer spending.

Participants
Speaker: Merryn Somerset Webb - Editor-in-chief, MoneyWeek

What is the cost of Carbon and the implications for airport finance and investment?
12:00 - 12:40
State of the Industry plenary sessions
With ESG firmly at the top of stakeholders' agendas, how will an asset's carbon accreditation impact its ability to raise finance and investment?

Participants
Panellist: Jamie Doyle - Managing Director, Infrastructure Finance, NatWest
Panellist: Beata Sperling-Tyler - Associate Director, Infrastructure Ratings, S&P Global Ratings

Guest address: What does world class corporate culture look like?
12:40 - 13:00
State of the Industry plenary sessions

Participants
Speaker: Fiona McKay - Global Leadership & Transformation Strategist, Lightbulb Leadership Solutions

Lunch and 1-2-1 networking meetings
13:00 - 14:30
State of the Industry plenary sessions
Use the Brella networking app to set up meetings with colleagues and identify new potential business partners.

Is the will for privatisation waning?
14:30 - 15:10
Stream A: Optimising airport assets
What do recent hybrid private partnership models, JVs and project delivery models reveal about the climate for privatisation?

Participants
Panellist: Anthony Martin - Development Director Airport O&M, Egis
Panellist: Daniel Bircher - CEO, Zurich Airport International Asia
Moderator: Kenneth Currie - Founder & Managing Director, Skylark Consulting Group

Turning assets around - investing for the long hall.
14:30 - 15:10
Stream B: Optimising airport assets
Operationalising pre-acquisition strategy and turning a negative into a positive whilst managing shareholder expectations?

Participants
Panellist: Gerald Ong - Director, Aviation Marketing, Malaysia Airports Holdings Berhad
Panellist: Holger Linkweiler - Managing Director, AviAlliance

Board members' bootcamp
14:30 - 15:10
In the Boardroom
A bootcamp for business leaders and board members to analyse what steps you can take to transform culture, create forums for creative collaboration and essentially, enhance performance. Whether you are bringing together public and private workforces, preparing your board for investment or M&A, looking for partners or managing an airport day-to-day, this is an opportunity to put your practices under the microscope.

Participants
Speaker: Fiona McKay - Global Leadership & Transformation Strategist, Lightbulb Leadership Solutions

What are the growth drivers for a regional airport and how can investors realise the full potential of emerging markets?
15:10 - 15:35
Stream A: Investing in airports strategy

Participants
Speaker: Andreas Jahnke - Managing Director, Lufthansa Consulting
Dublin airport project overview
15:10 - 15:35
Stream B: Optimising airport assets

Participants
Speaker: Ray Gray - Group CFO, daa plc

Deals in the pipeline: airport PPP showcase
15:10 - 15:35
In the Boardroom
Watch this space for airports coming to market or get in touch to recommend or promote a PPP

Airport investment opportunities in emerging markets
15:35 - 16:15
Stream A: Investing in airports strategy
• Balancing the risks and rewards of emerging vs developed market airport investments
• Lessons learnt from past transactions
• The deal pipeline in emerging market airports

Participants
Moderator: Peter Stonor - Head of Transport, Infrastructure & Industrials, VTB Capital

How do you cope with 20% growth as a private investor?
15:35 - 16:15
Stream B: Optimising airport assets
Beyond building out, how do you manage technology, access, real estate and staffing, within existing charging regimes to upscale all operations?

Participants
Panellist: Satyaki Raghunath - Chief Strategy & Development Officer, Bangalore International Airport

Transaction case study
15:35 - 16:15
In the Boardroom
Watch this space for an update on completed transactions or get in touch if there is a deal you are interested in or would like to promote.

Refreshments and networking break
16:15 - 16:45

GAD Annual deal of the year showcase
16:45 - 17:45
Plenary sessions

Participants
Speaker: Marcus Balmforth - Founder and Managing Director, Skylark Consulting Group

Roundtable discussions
16:45 - 17:45
In the Boardroom
Informal discussion groups and a chance to pick regional and subject matter experts brains on market developments and project updates featuring:
1. The latest news from the US market
2. New airports for Kazakhstan

Participants
Roundtable Host: Travis Brown - President, Grow Missouri
Roundtable Host: Asset Abdygapparov - CEO, Kazakhstan Investment Development Fund (KIDF) Management Company Ltd

Networking drinks reception
17:45 - 19:15
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## Schedule

**GAD World 2019 - Day 1 - 12/11/2019**

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**Contact Information**

+44 (0) 20 7017 7200  
finance.knect365.com/gad-world/  
info.events@knect365.com
Registration and coffee
08:30 - 08:50

Opening and welcome
08:50 - 09:00
Aviation industry plenary sessions

Market analysis: Fleets, routes and infrastructure
09:00 - 09:40
Aviation industry plenary sessions
Reviewing new aircraft technology and its impact on airline business models, what airline consolidation means for fleet movements and how are airlines responding to increasing demand and capacity challenges?

Participants
Speaker: Wendy Sowers - Market & Product Forecasting, Boeing Commercial Airplanes

The GAD World annual airline Head-to-Head
09:40 - 10:15
Aviation industry plenary sessions
How is the dialogue between airports and airlines changing?

Participants
Interviewer: Rigas Doganis - Chairman, European Aviation Club

Guest geo-political address: Understanding power and politics in the digital age
10:15 - 10:45
Aviation industry plenary sessions

Participants
Speaker: Tom Fletcher - Guest speaker, The Naked Diplomat

Morning coffee and networking
10:45 - 11:15
Aviation industry plenary sessions

What is the real benefit of automation?
11:15 - 12:00
Aviation industry plenary sessions
Airports are getting smarter but are we delighting customers by increasingly automating services? To what extent is "seamless" and its associated operational costs augmenting revenues and what are the true differentiators of experience that deliver competitive advantage?

Participants
Moderator: David Feldman - Managing Partner, Exambela Consulting

Redrawing the airport landscape in the Middle East
12:00 - 12:30
Aviation industry plenary sessions

Cyber Crime: Tackling the greatest threat to today's businesses
12:30 - 13:00
Aviation industry plenary sessions
Gain insights into the hacker mindset, how cyber-crime is evolving and lessons to learn to apply to your own organisation.

Participants
Speaker: FC aka Freakyclown - Co-CEO and Head of Ethical Hacking, Cygenta

Lunch, networking meetings and exhibition
13:00 - 14:00
Aviation industry plenary sessions
Exclusive Airport CEO/CFO networking lunch, by invitation only apply to Sophie.milton@knect365.com

To privatise or not to privatise? That is the question for Canada's airports
14:00 - 14:40
Stream A: Airport privatistaion around the world
How are Canadian airports managed and financed and what would be the case, the advantages and disadvantages to privatising them?

Participants
Panellist: Tom Ruth - President & CEO, Edmonton International Airport
Panellist: Philippe Rainville - President, Aéroports de Montréal

Terminal redevelopment projects
14:00 - 14:40
Stream B: Global airport development
• What is the need for re-developing existing infrastructure?
• How are these projects financed?
• What are the revenue projections and the business plan for delivering ROI?

Saudi Arabia: the next phase
14:40 - 15:10
Stream A: Airport privatistaion around the world

Participants
Speaker: Turki Alsydlani - Airports Concession Manager, General Authority of Civil Aviation

Taking a new approach to improve capital productivity and reduce capex on airport projects
14:40 - 15:10
Stream B: Global airport development
Where can smart use of technology help to deliver construction projects faster whilst maintain operational service standards in busy airports?

Participants
Speaker: Frédéric Remond - Associate Principal, McKinsey & Company

Mature market focus: Spotlight on Italy
15:10 - 15:50
Stream A: Airport privatistaion around the world
What can we learn from this unique market in terms of hybrid ownership models, competitive dynamic and future opportunities?

Participants
Panellist: Nazareno Ventola - CEO & Managing Director, Aeroporto G. Marconi Di Bologna
Panellist: Laura Pascotto - Partner – Investment Team, F2I Sgr SpA
Panellist: Marco Troncone - Chief Strategy & Financial Officer, Aeroporti di Roma

Financing models for greenfield airports
15:10 - 15:50
Stream B: Global airport development
• How are public and private partners forecasting traffic growth, revenue predictions and structuring financing for greenfield projects?

Refreshments, networking and exhibition
15:50 - 16:15
Chairmen's remarks
16:15 - 16:20
Economic regulation deep dive

Participants
Chairman: Andy Ricover - Specialist, Air Transport

What is the role of regulation in determining the financeability of large capex programmes?
16:20 - 16:40
Economic regulation deep dive
• Testing the financeability of the regulatory settlement
• Examining the effect of downward pressure on the cost of capital on financeability
• What are the regulatory solutions to issues that arise?

Participants
Speaker: Adrian Corcoran - Director of Economic Regulation, Commission for Aviation Regulation

The EU regulatory framework
16:40 - 17:00
Economic regulation deep dive
An update from the airport industry perspective on the European Commission's evaluation and impact assessment to revise the regulatory framework.

Participants
Panellist: Michael Stanton-Geddes - Head of Economics & Competition, ACI Europe

Regulating to support sustainable airport businesses models and deliver infrastructure development
17:00 - 17:30
Economic regulation deep dive
Panel discussion and Q&A

Networking drinks reception
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### Registration & Coffee
08:45 - 09:00

### Guest address: Time to change the status quo
09:00 - 09:45

**Plenary sessions**

With ever increasing challenges to aviation on the horizon and changing consumer behaviour, it’s time for airports to be pro-active not reactive, disrupt their own models, use assets differently to develop flexible and sustainable business models

**Participants**

Speaker: Rohit Talwar - CEO, Fast Future

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### Future airport case study
09:45 - 10:15

**Plenary sessions**

How are new airport facilities embracing digital, environmental and social considerations to add value beyond connectivity to their local environment?

**Brace yourselves for more disruption to non-aeronautical revenues!**
10:15 - 10:45

**Plenary sessions**

How is digital both a threat and an opportunity for airport revenues?

**Participants**

Speaker: Kian Gould - Founder & CEO, AOE

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### Networking, refreshments and exhibition
10:45 - 11:15

**Plenary sessions**

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### Self-Connect – will this drive growth at regional airports?
11:15 - 11:45

**Plenary sessions**

A case study based on recent research to discover:

- What is the size of the revenue opportunity and potential additional traffic?
- What are the operational considerations?
- How have projects to develop self-connect facilities performed and how do you measure the ROI

**Participants**

Speaker: Laurent Delarue - Director, Consulting, IATA

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### Are airports evolving into Tech and Data businesses?
11:45 - 12:30

**Plenary sessions**

In a world where aviation business are increasing using digital facilities to provide additional services and data analysis to optimise processes, will the business’s data become its most valuable asset?

**Participants**

**Moderator: David Stroud - Managing Director, ASM Global Route Development**

**What have we achieved in the last 3 years in terms of PPP – People Process and product innovation?**
12:30 - 13:00

**Plenary sessions**

Have the promises of innovation labs and fostered an improved culture of innovation and the adoption of a more flexible mindset?

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### Lunch and networking
13:00 - 14:00

**Plenary sessions**

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### Smart airport technology showcase
14:00 - 14:30

**Plenary sessions**

What’s new in terms of AI, blockchain, biometrics and robotics?

**How can you be smarter with your data?**
14:30 - 15:00

**Plenary sessions**

What operational advantages have we gained through increased data capture and blockchain implementation? Are the siloes between different stakeholders breaking down to achieve more efficient air travel?

**How far should we go with technological investment?**
15:00 - 15:30

**Plenary sessions**

Where should airports be prioritising their investments and should they be initiators or first followers when it comes to new technologies?

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### Tackling the bottlenecks to future growth
15:30 - 16:00

**Plenary sessions**

Where airport are seeing increasing caps on growth, noise control and environmental challenges, how can the industry innovate to find new models that enable industry growth and continued access to air travel in a more sustainable manner?
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<tr>
<td>09:45</td>
<td>09:45 - Future airport case study</td>
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<tr>
<td>10:00</td>
<td>10:15 - Brace yourselves for more disruption to non-aeronautical revenues!</td>
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<tr>
<td>10:00</td>
<td>10:45 - Networking, refreshments and exhibition</td>
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<tr>
<td>11:00</td>
<td>11:15 - Self-Connect – will this drive growth at regional airports?</td>
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<tr>
<td>11:00</td>
<td>11:45 - Are airports evolving into Tech and Data businesses?</td>
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<tr>
<td>12:00</td>
<td>12:30 - What have we achieved in the last 3 years in terms of PPP – People Process and product innovation?</td>
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<tr>
<td>13:00</td>
<td>13:00 - Lunch and networking</td>
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<tr>
<td>14:00</td>
<td>14:00 - Smart airport technology showcase</td>
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<tr>
<td>14:00</td>
<td>14:30 - How can you be smarter with your data?</td>
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<td>15:00</td>
<td>15:00 - How far should we go with technological investment?</td>
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<tr>
<td>15:00</td>
<td>15:30 - Tackling the bottlenecks to future growth</td>
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