

Infrastructure
Investor

Asia Summit

Virtual experience 2020

30 November-4 December
Virtual event UTC+8

Speakers Confirmed Include:

Thomas Walenta, Senior Investment Officer, **Asian Infrastructure Investment Bank**
Mujeeb Qazi, Head of Energy, Infrastructure Division, **ADIA**
Kishore Moorjani, Senior Managing Director, **Blackstone**
Dennis Chan, Head of Infrastructure, Managing Director, **China Ping An Insurance Overseas (Holdings) Limited**
Ludovic Theau, Chief Investment Officer, **Clean Energy Finance Corporation**
Wilson Chung, Principal APAC, **Digital Colony**
Sajal Kishore, Head of Asia Pacific, Infrastructure & Project Finance Ratings Group, **Fitch Ratings**
James Fraser Smith, Head of Unlisted Infrastructure & Timberland, **Future Fund**
Ang Eng Seng, Chief Investment Officer, Infrastructure, **GIC**
Aditya Aggarwal, CEO, **Global Infrastructure Partners Singapore**
Vince Dizon, Cabinet Secretary, Presidential Adviser on Flagship Programs and Projects, **Government of the Philippines**
Guillermo Martínez-Navas, Head of Offshore Wind, Asia, **Green Investment Group**
Tony Clamp, Director, Private Sector Facility, **Green Climate Fund**
Isabel Chatterton, Regional Industry Director, **IFC**
Seth Tan, Director, **Infrastructure Asia**
Lidia Medojevic, Associate Director, Real Assets, **Willis Towers Watson**

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Renewable Energy Forum

30th November 2020, Virtual Forum (times are based on HKT/UTC+8)

0830 **Tutorial**

0900 **PEI welcome and chairman's opening remarks**

0905 **Keynote Panel: Asia as the growth centre for renewables (50 mins)**

- How is the Asian renewables sector dealing with the Covid-19 crisis?
- What are the macroeconomic issues facing renewables as an investment sector?
- Asia as an investment destination compared to the US and Europe in 2020

Speakers: Tony Clamp, Director, Private Sector Facility, Green Climate Fund
Sajal Kishore, Head of APAC, Infrastructure & Project Finance Ratings Group, Fitch Ratings
Raymond Fung, Managing Partner, Albamen Capital Partners
Ang Eng Seng, Chief Investment Officer, Infrastructure, GIC

1000 **Keynote Presentation (30mins)**

Ludovic Theau, Chief Investment Officer, Clean Energy Finance Corporation

1035 **Interactive Roundtables (30mins)**

1: Battery Storage Session

2: Risk & Return in renewables

1110 **Panel: Investing in Asian offshore wind (45mins)**

- Analysis of current deal pipeline and impact of project delays
- The current landscape of offshore wind in Japan
- LP perspectives on the sector

Speakers: Guillermo Martínez-Navas, Head of Offshore Wind, Asia, Green Investment Group

1200 **Interactive Roundtables (30mins)**

1: ASEAN Renewables

2: Indian Renewables

1230 **Break (120mins)**

1430 **Panel: Infratech and the energy in transition (45mins)**

- The impact of disruption and its implications for technology
- Improving efficiency and accelerating investments in innovation, e.g. carbon capture and storage
- Understanding the emergence of new technologies



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Moderator: Isabelle Demir, Head of Real Assets, Frontier Advisors Pty Ltd
Speakers: Nick Gibson, Founder & General Manager, Glydways Japan
Matt Morgan, Managing Director, Infratech Growth Partners
Vishnu Amble, Global Strategic Investments, Corporate Ventures & Business
Development/Partnerships, Saudi Aramco

1520 **Interactive Roundtables (30mins)**

1: Autonomous vehicles **2: Taiwan Offshore Wind**

1600 **Presentation: Green Hydrogen: what are the investment opportunities? (30mins)**

Speaker: Gwen Collin, Head of Sustainable Finance, ENEA Consulting

1635 **Panel: Investing in solar (40mins)**

- State of the market: how has the crisis affected addition of solar capacity?
- In which areas in Asia is solar showing the most promise?
- Can India's solar market regain investor confidence?

1720 **Quick Fire Fund Pitch (30mins)**

1750 **Close of Conference**

Investor Forum

1st December 2020, Virtual Summit (times are based on HKT/UTC+8)

0800 **Website user Q&A**

0855 **PEI welcome and chairman's opening remarks**

0900 **Keynote Panel: Investing in Asia in the time of Covid-19 (50mins)**

- The current state of Asian economies and their impact on infrastructure growth
- Assessing the impact – which sectors have been hit the hardest?
- What is the new normal for infrastructure in Asia?

Speakers: Isabel Chatterton, Regional Industry Director, IFC
Seth Tan, Director, Infrastructure Asia
Aditya Aggarwal, CEO, Global Infrastructure Partners Singapore



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0955 **Keynote Presentation (30mins)**

1030 **Presentation: The impact of Covid 19 on unlisted infrastructure equity returns in Asia Pacific - Q3 2020 update (30mins)**

Speaker: Frederic Blanc Brude, Director, EDHEC Infrastructure Institute Singapore

Interactive Roundtable (30mins)

Indian Infrastructure

1105 **Keynote Case Study: The impact of Covid-19 on airports and transportation – implications for investors (30mins)**

Speaker: James Fraser Smith, Head of Unlisted Infrastructure & Timberland, Future Fund

1140 **Panel: Meet the GPs – how do they assess their portfolios and the current market? (50mins)**

- Amid the crisis, in what sectors hold value? What are the opportunities in distressed assets?
- How have GPs adjusted to the 'new normal'? How has this affected their investment strategies and operations?
- How do GPs evaluate the current fundraising environment?

Speakers: Aditya Aggarwal, CEO, Global Infrastructure Partners Singapore

1230 **Break (120mins)**

1430 **Interactive Roundtables (30mins)**

1: ASEAN Infrastructure

2: Infrastructure debt

3: ESG

1505 **Panel: New growth opportunities in infrastructure and the rise of digital (45mins)**

- New areas of infrastructure investing - digital infra, data centres etc.
- The impact of 5G in spurring the digital revolution
- Are they recession proof? What are the growth opportunities?

Speakers: Kishore Moorjani, Senior Managing Director, Blackstone
Wilson Chung, Principal APAC, Digital Colony
LN Sadani, Founder & CEO, Lensbridge Capital



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1555 **Panel: Implementing successful investment strategies for Emerging Asian markets (45mins)**

- Where are the safe markets and safe sectors for emerging markets in Asia?
- The renewable energy sector in ASEAN – a strong rebound?
- Which sectors are seeing a drive in PPPs?

Moderator: Andrew Kinloch, Managing Director, Logie Group

Speakers: Neil Brown, Partner, Actis

Mujeeb Qazi, Head of Energy, Infrastructure Division, ADIA

Vince Dizon, Cabinet Secretary, Presidential Adviser on Flagship Programs and Projects, Government of the Philippines

Allard Nooy, CEO, InfraCo Asia

1645 **Interactive Roundtables (30mins)**

1: Risk Management

2: Infratech

3: Digital Infrastructure

1720 **Interview: An introduction to the UK regulatory system for Asian investors (30mins)**

- Examining the role of regulators and the evolution of relationships with industry
- How does the system of price controls balance investor and consumer interests and underpin reliable investment in UK infrastructure?
- Future challenges: infrastructure investment in context of Net Zero and the Covid-19 recovery

Interviewee: Rachel Fletcher, CEO, Ofwat & UK Regulators Network

1755 **Virtual Cocktails**

1845 **Close of Day One**

2nd December 2020, Virtual Summit (times are based on HKT/UTC+8)

0900 **PEI welcome and chairman's opening remarks**

0910 **Panel: Understanding the APAC LP – portfolio allocations & investment strategy (45mins)**

- How have APAC LPs been revaluating their portfolios?
- Where are they increasing/decreasing their allocations? In which areas have they been hit?
- How have LPs been dealing with travel constraints and challenges of executing due diligence?

Moderator: Lidia Medojevic, Associate Director, Real Assets, Willis Towers Watson



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Speakers: Thomas Walenta, Senior Investment Officer, Asian Infrastructure Investment Bank
Takahiro Kato, Executive Director, Head of International Fund Investment, DBJ Asset Management
Jordan Kraiten, Head of Infrastructure, Hostplus
Henry Lui, Senior Vice President, Sumitomo Mitsui Trust Bank

1000 **Interactive Roundtables (30mins)**

1: LP Roundtable **2: Due Diligence & Reporting during Covid-19**

1035 **Developing Infrastructure as a sustainable asset class (45mins)**

- Does all infrastructure need to be sustainable post Covid-19?
- Creating long term sustainable infrastructure portfolios for investors
- Preparing portfolios for the climate change challenge

Speakers: Xinying Tok, Senior Manager, Asia Research & Engagement (ARE)
Alexandra Tracy, Managing Director & Founder, Hoi Ping Ventures
Dennis Chan, Head of Infrastructure, Managing Director, China Ping An Insurance Overseas (Holdings) Limited

1125 **Presentation: Infrastructure and pandemic risk – how best to prepare for the next outbreak (30mins)**

1200 **Interactive Roundtables (30mins)**

Session 1: **Session 2:** **Session 3:**

3rd December 2020, Virtual Summit (times are based on HKT/UTC+8)

1400 **Interactive Roundtable**
Australian Infrastructure

4th December 2020, Virtual Summit (times are based on HKT/UTC+8)

1400 **Interactive Roundtable**
Women in Infrastructure



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