

Infrastructure  
Investor

# Asia Summit

## Virtual experience 2020

30 November-4 December  
Virtual event UTC+8

### Speakers Confirmed Include:

Xinying Tok, Senior Manager, **Asia Research & Engagement (ARE)**  
Thomas Walenta, Senior Investment Officer, **Asian Infrastructure Investment Bank**  
Ludovic Theau, Chief Investment Officer, **Clean Energy Finance Corporation**  
Wilson Chung, Principal APAC, **Digital Colony**  
Frederic Blanc Brude, Director, **EDHEC Infrastructure Institute Singapore**  
James Fraser Smith, Head of Unlisted Infrastructure & Timberland, **Future Fund**  
Aditya Aggarwal, CEO, **Global Infrastructure Partners Singapore**  
Tony Clamp, Director, Private Sector Facility, **Green Climate Fund**  
Isabel Chatterton, Regional Industry Director, **IFC**  
Allard Nooy, CEO, **InfraCo Asia**  
Seth Tan, Director, **Infrastructure Asia**  
LN Sadani, Founder & CEO, **Lensbridge Capital**  
Bruce Crane, Managing Director, **OMERS**  
Dania Zinurova, Director of Manager Research Australia, **Willis Towers Watson**

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### Supporting Association



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## Renewable Energy Forum

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

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

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

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

**Speakers:** Nick Gibson, Founder & General Manager, Glydways Japan

**Matt Morgan, Managing Director, Infratech Growth Partners**

1520 **Interactive Roundtables (30mins)**

**1: Autonomous vehicles**

**2: Taiwan Offshore Wind**



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

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 **Deal Pitch Roundtable (30mins)**

1750 **Close of Conference**

## Investor Forum

1-2 December 2020, Virtual Summit (times are based on HKT/UTC+8)

0800 **Registration and coffee**

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

0955 **Keynote Presentation (30mins)**

1030 **Interactive Roundtables (30mins)**

**1: ASEAN Infrastructure                      2: Indian Infrastructure                      3: Australia**

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



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- 1135 **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
- 1225 **Break (125mins)**
- 1430 **Interactive Roundtables (30mins)**
- 1: Co-investing                      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:** Wilson Chung, Principal APAC, Digital Colony  
LN Sadani, Founder & CEO, Lensbridge Capital
- 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?
- Speakers:** Allard Nooy, CEO, InfraCo Asia
- 1600 **Interactive Roundtables**
- 1: Risk Management                      2: Infratech                      3: Digital Infrastructure**
- 1635 **Presentation: Global Macroeconomics: Assessing the economic recovery and what it means for Asia?**
- 1705 **Close of Day One**



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### Investor Forum Day 2

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:** Dania Zinurova, Director of Manager Research Australia, Willis Towers Watson

**Speakers:** Thomas Walenta, Senior Investment Officer, Asian Infrastructure Investment 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)

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:**

1230 **Close of forum and conference**



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