

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**
Kishore Moorjani, Senior Managing Director, **Blackstone**
Ludovic Theau, Chief Investment Officer, **Clean Energy Finance Corporation**
Wilson Chung, Principal APAC, **Digital Colony**
Frederic Blanc Brude, Director, **EDHEC Infrastructure Institute Singapore**
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**
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**
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)

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, Chief Investment Officer, JIDA Capital
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

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

0955 **Keynote Presentation (30mins)**



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- 1030 **Interactive Roundtables (30mins)**
1: ASEAN Infrastructure 2: 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
- 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: Kishore Moorjani, Senior Managing Director, Blackstone
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**
- 1645 **Interactive Roundtables (30mins)**
1: Risk Management 2: Infratech 3: Digital Infrastructure
- 1720 **Presentation: Global Macroeconomics: Assessing the economic recovery and what it means for Asia? (30mins)**



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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 reevaluating 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

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:

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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