

Infrastructure
Investor

Asia Summit

Virtual experience 2020

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**

Previous event partners



In partnership with Blackstone



For programme information:
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andrew.w@peimedia.com

For sponsorship opportunities:
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For registration queries:
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Renewable Energy Forum

18th November 2020, Virtual Forum

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

0910 **Keynote Panel: Asia as the growth centre for renewables**

- 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

1000 **Keynote Presentation**

Ludovic Theau, Chief Investment Officer, Clean Energy Finance Corporation

1030 **Birds of a feather**

"Birds of a feather" is the virtual equivalent of a breakout or roundtable at a traditional conference, you will be face-to-face with likeminded peers and a specialist moderator to push forward the asset class.

Session 1: Co-investing Session 2: Battery Storage Session 3: Hydro

1100 **Panel: Investing in Asian offshore wind**

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

1150 **Panel: Risk return and renewables**

- Which sectors face the most risk?
- Impact of low oil pricing for renewables – long term implications?
- Understanding construction and supply chain risk in the current crisis

1240 **Birds of a feather**

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Session 1: ASEAN Renewables 2: Indian Renewables 3: Japan/Korea Renewables

1400 **Panel: Infratech and the energy in transition**

- 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

1445 **Case study: Assessing the impact of Chinese supply chains**

1515 **Birds of a feather**

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Session 1: Autonomous vehicles 2: Climate Finance Session 3: Offshore Wind

1545 **Presentation: Green Hydrogen: what are the investment opportunities?**

1615 **Panel: Investing in solar**

- 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?

1700 **Close of Conference**



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Investor Forum

19-20 November 2020, Virtual Summit

0800 **Registration and coffee**

0850 **PEI welcome and chairman's opening remarks**

0900 **Keynote Panel: Investing in Asia in the time of Covid-19**

- 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?

0950 **Keynote Presentation**

1020 **Presentation: Global Macroeconomics: Assessing the economic recovery and what it means for Asia?**

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

1125 **Case Study: The impact of Covid-19 on airports and transportation – implications for investors**

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

1205 **Panel: Meet the GPs – how do they assess their portfolios and the current market?**

- 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?



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1255 **Birds of a feather**

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Session 1: Co-investing Session 2: Infrastructure debt Session 3: ESG

1400 **Panel: New growth opportunities in infrastructure and the rise of digital**

- 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?

1445 **Panel: Implementing successful investment strategies for Emerging Asian markets**

- 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?

1530 **Birds of a feather**

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Session 1: Risk Management Session 2: Infrotech Session 3: Digital Infrastructure

1605 **Investing in Infrastructure debt**

- Impact of Covid-19 on infrastructure debt markets
- Does investor sentiment in infrastructure debt remain strong?
- Opportunities for investing in distressed debt

1700 **Close of Day One**

Investor Forum Day 2

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

0910 **Panel: Understanding the APAC LP – portfolio allocations & investment strategy**



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- 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?

0955 **Case Study: Investing in medical infrastructure**

1025 **Birds of a feather**

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Session 1: LP Lounge 2: Due Diligence & Reporting Session 3: Asset management

1105 **Developing Infrastructure as a sustainable asset class**

- 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

1150 **Presentation: Infrastructure and pandemic risk – how best to prepare for the next outbreak**

1220 **Birds of a feather**

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Session 1: Session 2: Session 3:
Session 4: Session 5: Session 6:

1300 **Close of forum and conference**



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