



Infrastructure
Investor

Global Investor Offsite 2021

22 – 24 June, virtual event

Last updated 22/06/2021

PEI

Agenda

Day 1 – Tuesday 22nd

UTC+1 14:00 – 14:45 Infrastructure Investor welcome & ‘meet the Passport holders’ speed networking

Global start times: NY 09:00 | LDN 14:00 | HK/SG/CN 21:00 | SYD 00:00 (Wednesday)

New to virtual or an experienced attendee? Spend some time meeting fellow Global Passport holders as we explain how to make the most of the Global Investor Offsite format, introduce you to the platform and help you connect with your global peers.

UTC+1 14:45 – 15:00 Networking tutorial

Global start times: NY 09:50 | LDN 14:50 | HK/SG/CN 21:50 | SYD 00:50 (Wednesday)

We talk you through how to make the most of the full range of networking opportunities available at the Global Investor Offsite. Sessions are running across three time zones for the next two days, so don't miss your chance to find out how to connect with over 200 global investors in attendance.

UTC+1 15:00 – 22:00 Networking opens and 1-2-1 meetings available until 22:00 LDN/17:00 NY

Global start times: NY 10:00 | LDN 15:00 | HK/SGP/CN 22:00 | SYD 01:00 (Wednesday)

Agenda

Day 2 – Wednesday 23rd

UTC+1

06:00 – 00:00 Networking opens

Global start times: NY 01:00 | LDN 06:00 | HK/SGP/CN 13:00 | SYD 16:00

UTC+8

14:00 – 14:45 The rise of Asian funds

Global start times: NY 02:00 | LDN 07:00 | HK/SGP/CN 14:00 | SYD 17:00

- How are fund manager investments progressing in APAC?
- What attracts them to Asia?
- Finding promising deal flow and executing

Followed by meet the speakers live Q&A and networking.

Nadia Kalic, Partner, Sydney, [Clifford Chance](#)

Chenhua Shen, Managing Director, [I Squared Capital](#)

David Luboff, Head of Asia-Pacific Infrastructure, [KKR](#)

Frank Kwok, Senior Managing Director and Head of Asia Pacific, [Macquarie Group](#)

Ambalika Banerji, Executive Director, Direct Investments, [National Investment and Infrastructure Fund \(NIIF\)](#)

APAC

Agenda

Day 2 – Wednesday 23rd

UTC+8

15:00 – 15:45 Decarbonizing the portfolio post COP26

Global start times: NY 03:00 | LDN 08:00 | HK/SGP/CN 15:00 | SYD 18:00

- Assessing the impact of China and Japan's decarbonization goals for infrastructure investment
- Which renewable energy technologies and which Asian markets will succeed in 2022?
- Asia as the new epicentre for offshore wind

Followed by meet the speakers live Q&A and networking.

Jeffrey Altman, Senior Advisor, [Finadvice](#)

Deepali Bahl, Head, IFC Global Infrastructure Fund, [IFC](#)

Ayaka Fujiwara, Climate Investment Specialist, [Green Climate Fund](#)

Felix Zhang, Group Executive Director, [Envision Energy](#)

APAC

Agenda

Day 2 – Wednesday 23rd

UTC+8

16:00 – 16:45 Asia as a strategy for portfolio diversification

Global start times: NY 04:00 | LDN 09:00 | HK/SGP/CN 16:00 | SYD 19:00

- Investing in growth Asia vs developed Asian markets
- FX risk/currency hedging strategies and how to manage more volatile regional currencies
- Understanding local taxation incentives for investment across the region

Nicole Goh, Head, Infrastructure Asia ex-China, [GIC](#)

Andrew Kinloch, Managing Director, [Logie Group](#)

Prateek Maheshwari, Managing Director, [OMERS Infrastructure](#)

Jie Gong, Partner, [Pantheon](#)

Rohit Nanda, Head of Asia, Principal Investments – Infrastructure, [Sumitomo Mitsui Banking Corporation](#)

APAC

UTC+1

10:00 – 11:00 Comparing EMEA & APAC approaches to ESG and sustainability

Global start times: NY 05:00 | LDN 10:00 | HK/SGP/CN 17:00 | SYD 20:00

- Climate change, the energy transition and infrastructure
- Keeping ESG at the forefront of investor mindsets
- What other regions can learn from best-in-class investors in APAC

Ronak Ronak, Principal, [Campbell Lutyens & Co](#)

Rohit Anand, Head of Infrastructure, South Asia, [CDC Group](#)

Mary Nicholson, Head of Responsible Investment, [Macquarie Infrastructure and Real Assets](#)

Simon Whistler, Senior Specialist, [PRI](#)

CROSS REGION

Agenda

Day 2 – Wednesday 23rd

UTC+1

11:00 – 12:00 Above 5%: how to get more out of your renewable funds

Global start times: NY 06:00 | LDN 11:00 | HK/SGP/CN 18:00 | SYD 21:00

- Moving beyond vanilla wind and solar strategies in search of alpha
- How disruptive technologies can boost energy & electricity distribution
- Solving supply and demand issues for operating assets

Followed by meet the speakers live Q&A and networking.

Jaroslava Korpanec, Head of Infrastructure, [Allianz Capital Partners](#)

Paul O'Donnell, Partner, [Greencoat Capital](#)

Laurent Segalen, Managing Partner, [Megawatt-X](#)

Sybille Grandgeorge, Industry Banker Power and Renewables, [Natixis](#)

Jonathan Maxwell, Founder and Chief Executive Officer, [Sustainable Development Capital](#)

EMEA

Agenda

Day 2 – Wednesday 23rd

UTC+1

12:00 – 13:00 Has the market accurately assessed valuations post-pandemic?

Global start times: NY 07:00 | LDN 12:00 | HK/SGP/CN 19:00 | SYD 22:00

- Getting frothy: Assessing prices for renewable energy and digital infrastructure assets since the pandemic
- Public or private? Assessing differences in valuations between listed assets and those in the private markets
- Troubled sectors: Are there distressed opportunities for investors in airports or other transport assets?

Followed by meet the speakers live Q&A and networking.

Charles Hamieh, Managing Director, Portfolio Manager - [ClearBridge](#)

Canan Anli, Director - Head of Business Development ICT, [Mubadala Investment Company](#)

Bénédicte de Giafferri, Global Head, Real Assets Finance, [Natixis](#)

Adam Smallman, Director – Membership Programs, [PEI Media Group](#)

EMEA

Agenda

Day 2 – Wednesday 23rd

UTC+1

13:00 – 14:00 Global Keynote Opening Panel: Heavyweights from three regions discuss the state of play in infrastructure at the halfway point of the year

Global start times: NY 08:00 | LDN 13:00 | HK/SGP/CN 20:00 | SYD 23:00

Followed by live Q&A and networking.

Suzanne Gaboury, Director General, Private Sector Operations Department, [Asian Development Bank](#)

Anne Valentine Andrews – Deputy Head of Real Private Infrastructure Europe, Assets, [BlackRock](#)

Vivian Nicoli, Managing Director, Infrastructure, Europe, [CDPQ](#)

Kalliope Gourntis, Editor, [Infrastructure Investor](#)

Esther Peiner, Managing Director – [Partners Group](#)

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UTC+1

14:00 – 15:00 Meal break

Global Start times: NY 09:00 | LDN 14:00 | HK/SGP/CN 21:00 | SYD 00:00 (Thursday)

UTC+1

15:00 – 16:00 Keynote: leadership, risk and volatility

Global start times: NY 10:00 | LDN 15:00 | HK/SGP/CN 22:00 | SYD 01:00 (Thursday)

- Making sense of 18 months of restrictions, risk and opportunity
- Accepting where risk is inevitable and what to do about it
- Balancing data privacy, commercial power and increased regulation

Nick Allan, Chief Executive Officer, [Control Risks](#)

EMEA

Agenda

Day 2 – Wednesday 23rd

UTC+1

16:00 – 17:00 Digital infrastructure: does the reality match the hype of the ‘fourth utility’?

Global start times: NY 11:00 | LDN 16:00 | HK/SGP/CN 23:00 | SYD 02:00 (Thursday)

- Areas of focus; sub-sector, strategy, or asset type?
- Competition for larger (\$1bn+) vs. mid-market transactions
- Assessing exit strategies and hold periods for digital assets

Ed Stumpf, Investment Director, [Africa Infrastructure Investment Managers](#)

Jeff Coates, Senior Principal – Infrastructure and Renewable Resources, [British Columbia Investment \(BCI\)](#)

Steven Sonnenstein, Managing Director, [Digital Colony](#)

Zak Bentley, Senior Reporter, [Infrastructure Investor](#)

Elie Nammer, [Senior Director, Vauban Infrastructure Partners](#)

EMEA

UTC-4

12:00 – 13:00 How to push sustainability up the agenda in North American infrastructure

Global start times: NY 12:00 | LDN 17:00 | HK/SGP/CN 00:00 (Thursday) | SYD 03:00 (Thursday)

- Addressing social and economic issues intensified by covid-19 through sustainable infrastructure investments
- Can the infrastructure asset class unlock private capital for sustainable development?
- How can measurement and standards help ensure the success of a project both financially and for the communities where they are built?

US

Followed by meet the speakers live Q&A and networking.

Pierre Collins, Director – Investments, [Fondation Lucie Et Andre Chagnon](#)

Roxana Isaiu, Chief Sustainability Officer, [GRESB](#)

Mark Moseley, Principal and Owner, [Moseley Infrastructure Advisory Services \(MMM Infra\)](#)

Adam Bernstein, Managing Director, [North Sky Capital](#)

Agenda

Day 2 – Wednesday 23rd

UTC-4

13:00 – 14:00 Meal break

Global Start times: NY 13:00 | LDN 18:00 | HK/SGP/CN 01:00 (Thursday) | SYD 04:00 (Thursday)

UTC-4

14:00 – 15:00 North American fund manager roundtable

Global start times: NY 14:00 | LDN 19:00 | HK/SGP/CN 02:00 (Thursday) | SYD 05:00 (Thursday)

- How will the new administration impact the funding of US infrastructure?
- Discussing changes to manager investment strategies post-covid
- Examining the resiliency of the infrastructure asset class

Followed by meet the speakers live Q&A and networking.

Jennifer Gandin, Principal Investments, [CIM Group](#)

Sarah Borg-Olivier, Chief Operating Officer and Senior Vice President, [InstarAGF Asset Management](#)

Andrew Claerhout, Partner & Co-Head of Infrastructure, [Searchlight Capital Partners](#)

Irene Mavroyannis, Managing Partner, Private Capital Advisory, Infrastructure, [Sera Global](#)

US

Agenda

Day 2 – Wednesday 23rd

UTC-4

15:00 – 16:00 Investor strategies in the Americas

Global start times: NY 15:00 | LDN 20:00 | HK/SGP/CN 03:00 (Thursday) | SYD 06:00 (Thursday)

The state of play: institutional and private investors analyse the state of the infrastructure market amid an ongoing global pandemic

- Managing valuation shocks and portfolio liquidity issues
- Views on new fund commitments
- Re-upping with existing managers

Followed by meet the speakers live Q&A and networking.

Jan Mende, Senior Vice President, [Callan](#)

Guillaume Morency, Manager, Infrastructure Investments - [Desjardins Global Asset Management](#)

Kate Roscoe, Managing Director, Infrastructure Equity - [Manulife](#)

Kelly DePonte, Managing Director, [Probitas Partners](#)

Dima Blumin, Senior Portfolio Manager, Real Assets, [World Bank Pension Plan](#)

US

UTC-4

16:00 – 16:00 Close of day

Agenda

Day 3 – Thursday 24th

UTC+1

06:00 – 00:00 Networking opens

Global start times: NY 01:00 | LDN 06:00 | HK/SGP/CN 13:00 | SYD 16:00

UTC+8

14:00 – 14:45 Asset management in the new normal

Global start times: NY 02:00 | LDN 07:00 | HK/SGP/CN 14:00 | SYD 17:00

- How have investors managed their assets around Asia under the current travel restrictions
- Relationship building and sourcing partnerships during the pandemic – still feasible?
- Has the pandemic given rise to any innovation or improvements in asset management?

Jake Lee, Head of Infrastructure, [Hyundai Insurance](#)

Jacob Shu, Associate Director, Infrastructure Investments, [Manulife](#)

Tamara Singh, Head, Asia Pacific, [OMFIF](#)

Sandiren Curthan, Senior Director, Infrastructure Investments, [PSP Investments](#)

Rohit Nanda, Head of Asia, Principal Investments – Infrastructure, [Sumitomo Mitsui Banking Corporation](#)

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15:00 – 15:45 Asia Keynote: Fireside chat

Global start times: NY 03:00 | LDN 08:00 | HK/SGP/CN 15:00 | SYD 18:00

Keynote – John Walker, Chairman, [Eastpoint Partners](#)

Daniel Kemp, Superfunds Correspondent, [Infrastructure Investor](#)

After 22 years with Macquarie Group, John recently retired from his roles of Chairman Macquarie Group of Companies, Korea and Chairman of Macquarie Capital, Asia. He will be sharing reflections on his career and the development of the Infrastructure asset class in the region and prospects for a further accelerated growth in a post pandemic world.

APAC

Agenda

Day 3 – Thursday 24th

UTC+8

16:00 – 16:45 Driving more institutional capital into Asia

Global start times: NY 04:00 | LDN 09:00 | HK/SGP/CN 16:00 | SYD 19:00

- Dealing with COVID-19 challenges, how has this affected LP sentiment towards Asia?
- Finding the right risk return balance in the region's geographies and sectors
- Lessons learnt from seasoned investors in Asian emerging markets

Jingyi Zhang, Investment Officer, [Asian Infrastructure Investment Bank \(AIIB\)](#)

Johnny Adji, Senior Investment Director, [Cambridge Associates Asia](#)

Gwen Colin, Independent Advisor in Sustainable Finance, [G Capital Asia](#)

Allard Nooy, Chief Executive Officer, [InfraCo Asia Development](#)

Jansen Ang, Investment Leader, [Partners Group](#)

APAC

UTC+1

10:00 – 11:00 Investor strategies in APAC & EMEA

Global start times: NY 05:00 | LDN 10:00 | HK/SGP/CN 17:00 | SYD 20:00

The state of play: institutional and private investors analyse the state of the infrastructure market amid an ongoing global pandemic.

- Managing valuation shocks and portfolio liquidity issues
- Views on new fund commitments
- Re-upping with existing managers

Harry van den Heuvel, Senior Portfolio Manager, [Achmea Investment Management](#)

Aiva Sperberga, Principal, [Campbell Lutyens](#)

Yuriko Watanabe, Director, [Japan Post Bank](#)

Adam Smallman, Director – Membership Programs, [PEI Media Group](#)

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Agenda

Day 3 – Thursday 24th

UTC+1

11:00 – 12:00 Smart money: strategies to capitalise on market dislocations

Global start times: NY 06:00 | LDN 11:00 | HK/SGP/CN 18:00 | SYD 21:00

- Comparing distressed debt, turnaround and special situations with other strategies
- What do investors think of the various specialist strategies?
- Getting the timing right

Nicolas Le Clerc, Managing Director, [ADM Capital](#)

Nicholas Lucas, Investment Director, Infrastructure Debt, [Allianz Global Investors](#)

Andy Thomson, Senior Editor, [Private Debt Investor](#)

EMEA

UTC+1

12:00 – 13:00 The Brazilian PPI Programme

Global start times: NY 07:00 | LDN 12:00 | HK/SGP/CN 19:00 | SYD 22:00

- Outline of one of the most successful ongoing concession and privatization programs globally
- Impact of the program on the Brazilian macroeconomic environment
- Evolving quality of the regulation and contracts
- Recent and upcoming investment opportunities

Tarcisio Gomes de Freitas, Infrastructure Minister, [Ministry of Infrastructure](#)

EMEA

UTC+1

13:00 – 14:00 Meal break

Global Start times: NY 08:00 | LDN 13:00 | HK/SGP/CN 20:00 | SYD 23:00

Agenda

Day 3 – Thursday 24th

UTC+1

14:00 – 15:00 Market update from Infrastructure Investor

Global start times: NY 09:00 | LDN 14:00 | HK/SGP/CN 21:00 | SYD 00:00 (Friday)

Our reports analyse the current state of the infrastructure market and detail the significant trends affecting the asset class in each quarter. We review 2021 H1 from a fundraising perspective and look ahead to trends for H2 as the world tries to get back to normal.

Followed by live Q&A. Meet the investor research team and quiz them about the data in our virtual roundtable session.

Dan Gunner, Director of Research & Analytics, [PEI Media Group](#)

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UTC-4

10:00 – 11:00 Transportation infrastructure – the good, the bad and the ugly

Global start times: NY 10:00 | LDN 15:00 | HK/SGP/CN 22:00 | SYD 01:00 (Friday)

- Investors explain how to return transport assets to good health
- How airports can get their mojo back
- What are the capital markets and other financing sources' outlook on transportation businesses?

Angelika Schöchlin, Senior Partner, [Antin Infrastructure Partners](#)

Abigail Rayner, Principal, Real Assets, [HarbourVest](#)

Andrea Echberg, Partner and Head of Global Infrastructure and Real Assets, [Pantheon](#)

Chase Collum, Special Projects Editor, [PEI Media](#)

US

Agenda

Day 3 – Thursday 24th

UTC-4

11:00 – 12:00 A growing niche: key trends in post-pandemic infrastructure debt

Global start times: NY 11:00 | LDN 16:00 | HK/SGP/CN 23:00 | SYD 02:00 (Friday)

- The impact of low interest rates on debt market stakeholders – investors, banks, sponsors and more
- Is the market becoming increasingly borrower-friendly, and will this continue?
- What types of cash yields can investors expect?

Jemima Atkins, Infrastructure Debt, [Allianz Global Investors](#)

Bertrand Loubieres, Head of Infrastructure Finance, [AXA Investment Management](#)

Karen Azoulay, Head of Infrastructure Debt, [BNP Paribas Asset Management](#)

Alessandro Merlo, Head of Infrastructure Debt - [UBS Asset Management, Real Estate & Private Markets](#)

US

UTC-4

12:00 – 13:00 Diversity roundtable: shifting the approach

Global start times: NY 12:00 | LDN 17:00 | HK/SGP/CN 00:00 (Friday) | SYD 03:00 (Friday)

- Making diversity a business imperative
- Driving better results through greater diversity
- How does gender diversity within infrastructure compare to other asset classes?

Emma Haight-Cheng, Partner – Head of Infrastructure Debt Europe, [AMP Capital](#)

Aditi Mohapatra, Managing Director, [BSR](#)

Laurie Mahon, Vice-Chair, US Investment Banking, Global Investment Banking, [CIBC Capital Markets](#)

Annette Bannister, Head of European Infrastructure, [MetLife Investment Management](#)

US

UTC-4

13:00 – 19:00 Close of the Global Investor Offsite

Global Start times: NY 14:00 | LDN 19:00 | HK/SGP/CN 02:00 (Friday) | SYD 05:00 (Friday)



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