



Infrastructure Investor: Investor Forum 2025
St. Pancras Renaissance Hotel, 9 – 10th September

Lead Sponsors



Wifi Sponsor

Stonepeak

Sponsors



Speakers:

Andrew Hayward, Senior Analyst - Real Assets, **Albourne**
Kate Campbell, Founding Partner, **Astrid Advisors**
Elisabetta Leoni, Senior Investment Director, **AustralianSuper**
Juan Caceres, Principal, **Axium Infrastructure Europe**
Anish Butani, Managing Director, Infrastructure, **bfinance**
Jaime Alvarez, Portfolio Manager, **Brunel Pension Partnership**
Carolina Descio, Associate Director, **The Carbon Trust**
Sarah Mackintosh, Director, **Cleantech for UK**
Bill Green, Managing Partner, **Climate Adaptive Infrastructure**
Verdeep Dost, Infrastructure Investment Director, **The Crown Estate**
Revantha Rodriguez, Deputy Director, Corporate Finance, **Department of Transport**
José Cabrita, Head of Unit, **European Investment Fund**
Simon Davy, Managing Director, Investments, **Equitix**
Dan Bleasdale, Managing Director, **FirstPoint Equity**
Kamil Burganov, Senior Vice President, **GIC**
Joss Blamire, Director, Infrastructure, **GRESB**
Brunno Maradei, Founder, **Humaterra Advisory**
Nathalie Tidman, Editor, **Infrastructure Investor Deals**
Ali Miraj, Global Lead, Infrastructure Sponsor Coverage, **ING**



Olivia Eijking, Director/Founder, **Kreen**

Monika Bednarz, Managing Director, **Lagrange Financial Advisory**

Lisa Weaver-Lambert, Board Advisory and Strategic Business Transformation, Data & AI Executive

Thomas Bayerl, Global Head Illiquid Assets, Member of the Board of Management, **MEAG**

Kashif Khan, Director, **MetLife Investment Management**

Cara Williams, Global Head of Climate & Sustainability, **Mercer**

Anna Baumbach, Partner, **Palladio Partners**

Dan Mikulskis, Chief Investment Officer, **The People's Partnership**

Michela Bariletti, Chief Credit Officer, **The Phoenix Group**

Vladan Martinovic, Private Debt Origination, **PIC**

Lackshana Ponnampalam, Vice President, Manager Research, **Redington**

Abhishek Gupta, Head of Product, **Scientific Infra & Private Assets (SIPA)**

Madeleine Farman, Editor, **Secondaries Investor**

Tim Rees, Partner, **Stepstone**

Anthony Borreca, Senior Managing Director, **Stonepeak**

Morgan Sheil, Head of Impact, **World Fund**

Claudio Ghisu, Co-Head Infrastructure, **YIELCO Investments**



Day One 9th September:

8.00 Registration opens

9.05 Welcome from Infrastructure Investor

9.10 Introduction from the Chair

9.20 Opening keynote panel: [How infrastructure investment provides stability in times of uncertainty](#)

- What is infrastructure in the “new world order?” How the asset class is evolving and where the opportunities lie - including the integration of emerging sectors such as defence
- What is infrastructure’s role as an inflation hedge in a volatile market
- Adapting to megatrends: Investor success in navigating an unpredictable economic landscape

Moderator: **Ali Miraj**, Global Lead, Infrastructure Sponsor Coverage, **ING**

Speakers:

Anthony Borreca, Senior Managing Director, **Stonepeak**

Anna Baumbach, Partner, **Palladio Partners**

Elisabetta Leoni, Senior Investment Director, **AustralianSuper**

Panel position reserved for Vauban

Panel position reserved for Antin

10.00 Panel: [Diversification through infrastructure: Balancing core and value-add assets](#)

- Infrastructure as a safe haven: How diversification strengthens portfolios, especially in uncertain markets
- How to manage concentration risk by balancing exposure to digital infrastructure and the energy transition
- Investor perspectives on the “right mix” of core and value-add infrastructure assets to achieve long-term resilience and sustainable returns

Moderator: **Kate Campbell**, Founding Partner, **Astrid Advisors**

Speakers:

Simon Davy, Managing Director, Investments, **Equitix**

Kashif Khan, Director, **MetLife Investment Management**

Abhishek Gupta, Head of Product, **Scientific Infra & Private Assets (SIPA)**

Lackshana Ponnampalam, Vice President, Manager Research, **Redington**

10.40 Presentation

11.00 Morning networking & coffee break

11.30 Panel: [The future of energy infrastructure](#)

- Understanding the development of energy transition funds. How do they now sit within traditional infrastructure portfolios?

Infrastructure Investor

- Assessing the changes of the energy mix and what that looks like moving forward
- How to tackle the economic and social challenges that run alongside the energy transition

Moderator: **Anish Butani**, Managing Director, Infrastructure, **bfinance**

Speakers:

Verdeep Dost, Infrastructure Investment Director, **The Crown Estate**

Claudio Ghisu, Co-Head Infrastructure, **YIELCO Investments**

Olivia Eijking, Director/Founder, **Kreen**

Jaime Alvarez, Portfolio Manager, **Brunel Pension Partnership**

12.10 Panel: [Exploring strategies and techniques shaping value creation across the asset class](#)

- How advances in technology are adding value to infrastructure assets
- The shifting role of sustainability: what influence do sustainable initiatives have in driving value creation in the current landscape?
- Lessons from experience: Case studies demonstrating successful infrastructure value creation

Moderator: **Lisa Weaver-Lambert**, Board Advisory and Strategic Business Transformation, **Data & AI Executive**

Speakers:

Juan Caceres, Principal, **Axium Infrastructure Europe**

12.45 Panel: [Beyond AI and Data Centres - What's next for digital infrastructure?](#)

- Are we in a bubble phase when it comes to AI-driven infrastructure investment?
- How are investors prioritising capital deployment across the different digital infrastructure verticals (data center, fiber, etc.) given AI's evolving infrastructure needs?
- Balancing the investment opportunities surrounding AI with the regulatory challenges

13.15 Lunch

14.15: Panel: [Addressing the evolving power needs of data centers](#)

- What role to the hyperscalers have to play in sustainably powering data centers?
- Cooling accounts for nearly 40% of a data center's energy use. Exploring the right technologies, from air cooling to liquid cooling, and the investment opportunities they present
- Exploring the adoption of strategies for development of disaster-resilient data center infrastructure

Moderator: **Joss Blamire**, Director, Infrastructure, **GRESB**

14.50 Panel: [The resilience of infrastructure](#)

- Examining stress-testing approaches and risk mitigation strategies to effectively manage disruptions
- Comparing resilience standards across digital, energy, and transport infrastructure
- Highlighting how infrastructure continues to withstand shocks and stresses, with a focus on successful collaboration models

Panel position reserved for GreenWish Group



15.25 Panel: [The road ahead: Overcoming negative sentiment around sustainability](#)

- How key players are steering the next stages of development and the global differences in their strategies
- Streamlining data management: Real life approaches LPs have used to efficiently process and respond to data requests
- Methods to turn the ESG backlash into investment opportunity

Moderator: **Cara Williams**, Global Head of Climate & Sustainability, **Mercer**

Speakers:

Morgan Sheil, Head of Impact, **World Fund**

Thomas Bayerl, Global Head Illiquid Assets, Member of the Board of Management, **MEAG**

16.00 Afternoon networking & coffee break

16.30 Fireside chat: [In conversation with Cleantech for UK](#)

Speaker: **Sarah Mackintosh**, Director, **Cleantech for UK**

17.00 Audience roundtables

17.55 Chair's closing remarks

18.00 End of day 1 and networking drinks reception

Join us for our end of day networking drinks reception with complimentary canapes and beverages

Day 2 – 10th September:

8.00 Registration opens & invite-only LP breakfast

9.20 Chair's welcome back

9.30: Fireside chat

9.50 Panel: [The surge in digital infrastructure: Where will capital flow next?](#)

- Managing and mitigating the risk of overexposure to the sub-asset class
- How investing in the right fibre network helps to maintain a competitive edge in the AI-driven era
- Where are investors seeing the next opportunity in digital infrastructure 3.0?

Moderator: **Andrew Hayward**, Senior Analyst - Real Assets, **Albourne**

10.30 Panel: [The secondaries boom: Unlocking liquidity and growth in infrastructure](#)

- How portfolio diversification supports the growth of infrastructure secondaries
- How to use continuation funds to retain assets while ensuring investor liquidity
- LP Perspectives: Infrastructure secondaries as a tool for risk management and stable returns

Moderator: **Madeleine Farman**, Editor, **Secondaries Investor**

Speakers:

Monika Bednarz, Managing Director, **Lagrange Financial Advisory**

Tim Rees, Partner, **Stepstone**

11.10: Morning networking & coffee break

11.40: Investor Keynote: [Insights from The People's Partnership](#)

Speaker: **Dan Mikulskis**, Chief Investment Officer, **The People's Partnership**

12.00 Panel: [Unlocking opportunities: Key drivers of investment-grade credit in a changing market](#)

- What makes certain territories attractive for investment, and how can opportunities be unlocked?
- Identifying best practices for aligning debt structures with evolving market demands
- Investor perspectives on risks, opportunities, and trends shaping the debt market

Moderator:

Speakers:

Vladan Martinovic, Private Debt Origination, **PIC**

Michela Bariletti, Chief Credit Officer, **The Phoenix Group**

12.40 Panel: [Climate integration in infrastructure](#)

- What does investing in climate look like today? Where do the opportunities lie?
- Defining a Climate Investor: Examining key LP considerations when allocating capital to climate-focused funds
- What is causing the financing gap and what innovations and incentives are required to mobilise investment in this space?

Moderator: **Dan Bleasdale**, Managing Director, **FirstPoint Equity**

Speakers:

Brunno Maradei, Founder, **Humaterra Advisory**

Bill Green, Managing Partner, **Climate Adaptive Infrastructure**

José Cabrita, Head of Unit, **European Investment Fund**

Carolina Descio, Associate Director, **The Carbon Trust**

13.20 Lunch & Women's Circle Networking lunch

14.20 Panel: [Partnering for progress: Unlocking the potential of transport infrastructure PPPs](#)

- Identifying key investments to keep infrastructure resilient
- Analysing the critical role of advancing low-emission transport and electric vehicle adoption
- Identifying PPP models that can drive the development of future-ready transport infrastructure

Moderator: **Nathalie Tidman**, Editor, **Infrastructure Investor Deals**

Speakers:

Revantha Rodriguez, Deputy Director, Corporate Finance, **Department of Transport**

Kamil Burganov, Senior Vice President, **GIC**

15.00 Panel: [Weathering the storm: Strategies for growth, divestment, and funding in utilities](#)

- Rebounding from setbacks: How can the sector overcome past challenges and evolve into a resilient investment opportunity
- Highlighting the importance of regulatory oversight and investor confidence in maintaining stable infrastructure operations
- How investors are driving change in utilities infrastructure

Speakers:

Panel position reserved for a Senior Leader, Ofwat

15.40 Debate: [This house believes the energy transition is the cornerstone of infrastructure capital raising](#)

This debate will explore whether the energy transition is the key driver of infrastructure capital raising or if investor allocations are becoming overly concentrated in the sector. Expect a lively discussion on market dynamics, risk diversification, and the long-term viability of current capital allocation trends.

16.20 End of conference