



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

Speakers:

Ali Miraj, Global Lead, Infrastructure Sponsor Coverage, **ING**
Andrew Hayward, Senior Analyst - Real Assets, **Albourne**
Anish Butani, Managing Director, Infrastructure, **bfinance**
Anna Baumbach, Partner, **Palladio Partners**
Anthony Borreca, Senior Managing Director, **Stonepeak**
Cara Williams, Global Head of Climate & Sustainability, **Mercer**
Claudio Ghisu, Co-Head Infrastructure, **YIELCO Investments**
Dan Bleasdale, Managing Director, **FirstPoint Equity**
Dan Mikulskis, Chief Investment Officer, **The People's Partnership**
Joss Blamire, Director, **Infrastructure, GRESB**
Jaime Alvarez, Portfolio Manager, **Brunel Pension Partnership**
Juan Caceres, Principal, **Axium Infrastructure Europe**
Kate Campbell, Founding Partner, **Astrid Advisors**
Lisa Weaver-Lambert, Board Advisory and Strategic Business Transformation, Data & AI
Executive
Madeleine Farman, Editor, **Secondaries Investor**
Michela Bariletti, Chief Credit Officer, **The Phoenix Group**
Monika Bednarz, Managing Director, **Lagrange Financial Advisory**
Nathalie Tidman, Editor, **Infrastructure Investor Deals**
Olivia Eijking, Director/Founder, **Kreen**
Sarah Mackintosh, Director, **Cleantech for UK**
Simon Davy, Managing Director, Investments, **Equitix**
Tim Rees, Partner, **Stepstone**
Tricia Ward, Head of Private Markets, **Redington**
Verdeep Dost, Infrastructure Investment Director, **The Crown Estate**
Vladan Martinovic, Private Debt Origination, **PIC**

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

Infrastructure Investor

- 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**

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**

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?
- 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**

12.50 Debate: [Is AI a game-changer for economic growth and efficiency, or does it pose more risks than rewards?](#)

This debate session will explore whether AI is a catalyst for economic growth, job creation, and efficiency or a disruptive force that threatens employment, privacy, and stability. Experts from both sides will discuss AI's impact on investment opportunities, regulatory challenges and will navigate the promises and risks of an AI-driven future.

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

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**

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**

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**

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

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