



**Infrastructure  
Investor  
Network**

**Investor Forum**



## 2024 Agenda

Tuesday 10 September

**Welcome cocktail reception**

*Join us on Tuesday evening at Lancaster House (Lancaster House, Stable Yard, St. James's, London SW1A 1BB) for the official welcome cocktail reception for the 2024 Infrastructure Investor: Investor forum.*

Wednesday 11 September

08:00 – 09:10

**Registration opens & Women's Circle Infrastructure Networking Breakfast**

09:10 – 09:15

**Welcome from Infrastructure Investor**

James Hatwell, Associate Director, PEI Group

09:15 – 09:20

**introduction from the chair**

Olivia Eijking, Director/Founder, Kreen Limited

09:20 – 10:00

## Opening keynote panel: How infrastructure can provide relative value amidst global uncertainty

Where are investors finding value across the infrastructure spectrum against a backdrop of geopolitical and macroeconomic volatility?

- Deglobalisation (e.g. Europe's green deal and pullback from China), digitalisation and decarbonisation – how are these key macro trends shaping investment decisions and allocations?
- Assessing infrastructure equity and debts' respective roles in the current climate
- How are investors tackling portfolio diversification in the quest for relative value?

Mounir Corm, Deputy CEO and Founding Partner, **Vauban Infrastructure Partners**

Lea Dubourg-Hrachovec, Managing Director & Head of London Office, **BCI – Infrastructure & Renewable Resources**

Lorenzo Marchioni, European Real Assets Investment Research, **Aksia Europe**

Nikolaus Woloszczuk, Senior Managing Director, **Stonepeak**

**Moderated by:** Anish Butani, Managing Director, **bfinance**

10:00 – 10:40

## Panel: Maintaining momentum in a sustainable and just transition

- Is the sector experiencing any fatigue or anti-sustainability sentiment in the face of a challenging macro environment? If so, how are investors overcoming this?
- Europe's changing energy system – what role are investors, policymakers and others having in it's next steps of development? How does this compare across the globe?
- Balancing portfolios – how investors can find the right balance of exposure across the energy spectrum whilst adhering to ESG goals

Ben Brinded, Head of Investment, **The Crown Estate**

Gabriele Todesca, Head of Infrastructure Investments, **European Investment Fund**

Saket Trivedi, Partner, **Cube Infrastructure Managers**

So Yeun Lim, Global Head of Infrastructure Research, **Willis Towers Watson**

**Moderated by:** Joss Blamire, Director, Infrastructure, **GRESB**

10:40 – 11:00

## Fireside chat: In conversation with Julia Prescott CBE

*In this wide-ranging fireside chat, Julia Prescott, Deputy Chair of the National Infrastructure Commission and Co-Founder of Meridiam, talks us through the latest developments across the private infrastructure market in the UK and beyond, including:*

- How the new Labour government's initiatives are shaping infrastructure investment decisions and opportunity in the UK
- How private and public entities are speeding up the delivery of major infrastructure projects in Europe
- What the future holds for this market – capital raising, performance, and the evolution of infrastructure

Julia Prescott CBE, Deputy Chair, **National Infrastructure Commission**

**Moderated by:** Kate Campbell, Founding Partner, **Astrid Advisors**

11:00 – 11:30

## Coffee & networking break

11:30 – 12:10

## Panel: Anticipating a rise in transportation asset investment

- Why understanding key trends in population behaviour and mobility is vital to grasping investment opportunities in this sector

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- How are investors servicing the need for transformation in transportation infrastructure across the globe?
- Electric vehicles, sustainable aviation fuel and more: financing the green transport revolution

M. Nicolas Firzli, Executive Director, **World Pensions Council**

Marya Moujahid, Senior Consultant, **EY**

Revantha Rodriguez, Co-Head, Corporate Finance, **Department for Transport**

Sujoy Roy, Executive Director, Head of Financing, **SBI Shinsei International**

Edward Tsai, Managing Director, **Wafra Inc.**

**Moderated by:** Nadya Nilina, Urban Planner, Strategy Director, **ORG Permanent Modernity**

12:10 – 12:50

### How are infrastructure funds creating value at the asset level?

- Analysing the value creation methods and practices being carried out in the market across different assets
- Why proactive, effective asset management is even more vital amidst current market volatility
- In it for the long-term: downside protection and value creation across the asset lifecycle

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

Juan Caceres, President, **Axium Infrastructure Europe**

Simon Merriweather, Senior Advisor, **GLIL Infrastructure**

**Moderated by:** Nathalie Tidman, Editor, **Infrastructure Investor Deals**

12:50 – 13:15

### Fireside chat: AI, technological innovation and adaptation in the built environment

- How are infrastructure funds utilising technology at the asset level?
- Assessing the continuing impact of artificial intelligence on infrastructure
- Examples within energy transition, transportation, the circular economy and more

Simon Rowell, Senior Advisor – Innovate UK, **UK Research & Innovation (UKRI)**

**Moderated by:** Phoebe Smith, Managing Director, **PATRIZIA UK**

13:15 – 14:15

## Networking lunch

14:15 – 14:50

### Panel: Documenting the rise and rise of infrastructure secondaries

- Why are investors choosing infrastructure secondaries in response to challenging market dynamics?
- How can long-term strategizing help set managers apart and define the infrastructure secondaries landscape?
- What further development is needed for the secondaries market to mature and grow?

Francisco del Pozo, Head of Infrastructure Funds, **Bestinver**

Tim Rees, Principal, **StepStone**

Daniel Roddick, Founder, **Ely Place Partners**

Richard Sem, Partner, **Pantheon**

**Moderated by:** Monika Bednarz, Managing Director, **Lagrange Financial Advisory**

14:50 – 15:25

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## Panel: Strategy & size considerations in an ever-changing private infrastructure market

- In a market headlined by mega-funds, where can investors find value at the other end?
- Considerations when it comes to asset specificity
- Assessing the performance of different fund strategies and sizes currently in market

Achal Bhuwania, Chief Investment Officer, **Equitix**

Jane Bowes, Managing Director, **Threadmark**

Simon Davy, Head of Real Assets, **LPPI**

Sam Lissner, Partner, **Ridgewood Infrastructure**

**Moderated by:** Eugene Zhuchenko, Director & Founder, **ETORE Advisory**

15:25 – 16:00

## Panel: Digital infrastructure in the crosshairs

- Has digital infrastructure cemented itself as a core part of an investors' private market portfolio?
- Amidst well-documented challenges in the fibre market, do data centres represent the best investment opportunity in digital infrastructure currently?
- Challenges in the sector: energy consumption and sustainability; AI demand; macroeconomic volatility & more – how are funds turning these into opportunities?

Natalia Akst, Managing Director, Real Assets, **Macquarie Asset Management**

Canan Anli, Senior Advisor, **PMP Strategy**

Katya Romashkan, Aware Super Portfolio Manager – Infrastructure, **Aware Super**

Pedro Estevez, Associate Director, **AustralianSuper**

**Moderated by:** Alessandro Ravagnolo, Partner, **Analysys Mason**

16:00 – 16:30

## Coffee & networking break

16:30 – 17:00

## Fireside chat: Developing financial products to solve problems

- A brief update on UKIB, Interaction with National wealth Fund and current mandate, sectors covered, products and deals to date.
- How have UKIB developed financial products, in particular their equity offering and the Pragmatic equity deal to solve a problem that can be replicated

Adrian Peacock, Managing Director, Banking & Investments, **UK Infrastructure Bank**

**Moderated by:** Charles Miller-Stirling, Private Capital Advisory, **The New Amsterdam Group**

17:00 – 17:55

## Audience roundtables

*Grab a drink and join your peers for the end-of-day interactive roundtables. In these informal, off-the-record discussions, you'll have the opportunity to choose and discuss the topic most pertinent to you. All tables will be facilitated by an industry leader:*

- 1) Natural capital and biodiversity – the next wave of sustainable infrastructure? Facilitated by **Divya Seshamani**, Managing Partner, **Greensphere Capital LLP**
- 2) Future UK water infrastructure opportunities, facilitated by **Kate Kendall**, Interim Senior Director, Major Projects and Markets Directorate, **Ofwat**
- 3) Infrastructure secondaries, facilitated by **Adrián López de Armentia**, Vice President, Secondaries Advisory, **Ely Place Partners**
- 4) The evolving democratisation of the private infrastructure market, facilitated by **Edward Talmor-Gera**, Founding Managing Partner & CEO, **NewVest**

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17.55 – 18:00

**Chair's closing remarks**

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

18:00

**Networking drinks reception**

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

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**Thursday 12 September**

08:00 – 09:20

**Registration opens and invite-only LP breakfast**

09:20 – 09:30

**Chair's welcome back**

09:30 – 09:50

**Fireside chat: An overview of the renewable energy landscape in the UK**

- The role of government in the renewable energy investment landscape
- How are investment patterns changing? Can investors get comfortable with new kinds of risks, and what benefits can this bring?
- Embracing emerging technologies and solutions – how does the Department see the renewable and energy transition market evolving over the coming years?

Sulaiman Ilyas-Jarrett, Head of Policy & Strategy, Renewable Delivery, **Department for Energy Security & Net Zero**

**Moderated by:** Anne-Louise Stranne Petersen, Senior Reporter, **Infrastructure Investor**

09:50 – 10:30

**Panel: Climate strategy evolution for infrastructure investors**

- How are climate investment/fund strategies developing for infrastructure fund managers?
- Adaptation and resilience – building vital infrastructure to move with a changing climate
- What climate action & incentives can be expected policy-wise with upcoming vital elections?
- The circular economy's evolving role in infrastructure investors' decarbonization and climate strategies

Rhyadd Keaney-Watkins, Head of ESG, **Arjun Infrastructure**

Natasa Kovacevic, Managing Director, Infrastructure, **CPP Investments**

Laurence Monnier, Director, **1PlanetInfra**

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

Mahesh Roy, Director, Investor Practices, **Institutional Investors Group on Climate Change**

**Moderated by:** Rhys Davies, Partner, ESG & Impact, **Kirkland & Ellis**

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10:30 – 11:10

**Panel: Asset performance – a return to the norm for infrastructure investors?**

- Returning to core characteristics or a cause for concern? How performance is having an impact on valuations of infrastructure assets
- How are managers alleviating concerns around performance?
- Which assets are continuing to perform well, and why?

Anna Baumbach, Partner, **Palladio Partners**

James Baldwin-Brown, Investment Consultant, **Lane Clark & Peacock LLP**

**Moderated by:** Karishma Merchant, Director – Energy, Infrastructure & Environment, **Forvis Mazars**

11:10 – 11:40

**Coffee & networking break**

11:40 – 12:00

**Presentation: Beyond the spreadsheet – putting the aesthetics back into infrastructure**

Hassan Shirwani, Pensions Manager, **LB Tower Hamlets**

12:00 – 12:40

**Polling debate: Breaking down the boundaries of the energy transition**

In a rapidly evolving sector, what developments and innovations are breaking the mould? In this interactive debate, you'll get a chance to vote for your winner once you've heard from four expert speakers on assets that are driving the next stage of the energy transition, including:

- Offshore/floating wind
- Energy islands
- Agrivoltaics

Joe Dutton, Energy Innovation Lead, **Axis Capital**

Adrien Pinsard, CEO, **Telis Energy Group**

Timothy Vanagt, Project Manager, **ORG**

**Moderated by:** Olivia Eijking, Director/Founder, **Kreen Limited**

12:40 – 13:20

**Discussion: The rise of impact strategies across global private infrastructure**

- Analysing the rise of impact funds across private markets and how they manifest themselves in infrastructure
- How are these funds playing their part in investor portfolios alongside existing sustainably-minded investments?
- Ensuring these investments are economically sustainable and inflation-linked as well as delivering true environmental impact

Erika Gupfa, Managing Director, **North Sky Capital**

Emma Haight, Consultant/NED

Tylor Hartwell, Managing Director, **EO Charging**

13:20 – 14:20

**Networking lunch & Women's Circle lunch**

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14:20 – 15:00

**Panel: Infrastructure debt and project financing – a growing role in investor portfolios?**

- Have favourable lending conditions been reflected in investor appetite for infrastructure debt?
- How can investors find relative value through financing in a dislocated global market?
- What strategies are proving most appealing across the debt spectrum?

Raphaël Laidez, Senior Director, Infrastructure Financing, **CDPQ**

Sunil Malhotra, Investment Director, Private Markets, **Universities Superannuation Scheme**

Martijn Proos, Co-Head, Emerging Market Alternative Credit, **Ninety One**

Sinéad Walshe, Director, Infrastructure Debt, **Aviva Investors**

**Moderated by:** Louisa Yeoman, Founding Partner, **Astrid Advisors**

15:00 – 15:40

**Panel: Keeping the lights on – are we doing enough when it comes to power generation and transmission?**

- How have deglobalisation and geopolitics destabilised the course of global power supply? How have private infrastructure investors responded to this?
- Are deployment rates doing enough to keep up with the ever-growing demand for electricity and power?
- Can renewables satisfy the demand for generation? If not, how can infrastructure investors responsibly invest in alternatives?

Alena Antonava, Investment Manager, **Railpen**

Alex O'Conneide, CEO, **Gore Street Capital**

Mick Watson, Deputy Director Regulatory Finance, **Ofgem**

**Moderated by:** Nathalie Tidman, Editor, **Infrastructure Investor Deals**

15:40 – 16:20

**Regulated assets and the role of public-private partnerships – addressing an under-pressure model with practical solutions?**

*Given the instability across essential utility companies, this session provides a health-check on the state of public-private partnerships in this sector in the UK & beyond:*

- What has caused the friction and perceived failures in water and wider utilities infrastructure?
- Looking forwards constructively – what needs to be true to attract the level of investment needed to create long term resilience of our key assets.
- How can the private sector really make positive changes that will improve the quality and longevity of these vital assets?
- Impact of a new UK government – what is the new outlook for these industries?

Dr. Emma FitzGerald, Independent NED, **Seplat Energy, Newmont**

Geoff Gage, Senior Partner, **Roland Berger**

Stephen Slessor, Chief Executive Officer, **RSE Group**

**Moderated by:** Jon Phillips, Chief Executive Officer, **Global Infrastructure Investor Association**

**16:20 End of conference**

Join the event

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