



Infrastructure Investor Network Australia Forum

22nd October 2024, Sofitel Hotel, Melbourne

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For more information regarding the event, please email andrew.w@pei.group

Monday 21st October (Times in AEST) Melbourne

1800: Welcome II Membership Cocktail Reception

Tuesday 22nd October Sofitel Hotel, Melbourne

0830 Registration & Networking

0900 PEI Opening Remarks

0905 Keynote Fireside Chat

Speaker: Nick O'Neil, Head of Australian Real Assets, **Australian Super**, interviewed by Daniel Kemp, APAC Editor, **Infrastructure Investor**

0935 Keynote Panel: The next era of Infrastructure Investing

- Global GP Consolidation – what does this mean for LPs? What role will independent managers have to play?
- Will renewables and digital sectors continue to dominate investing opportunities?
- Decarbonisation for industry in Australia opportunities
- What is the future role of core Australian infrastructure in global portfolios?

Moderator: Manish Rastogi, Head of Real Assets, **Frontier Advisors**

Speakers: Oleg Shamovsky, Managing Partner, **Arjun Infrastructure Partners**

Tobias Küng, Partner, **EQT Partners**

Sandra Lee, Head of Private Markets, **UniSuper**

David Scaysbrook, Co-Founder & Managing Partner, **Quinbrook Infrastructure Partners**

Hajir Naghdy, Senior Managing Director and Head of Asia and the Middle East,

Stonepeak

1025 Break

1055 Keynote presentation: AirCarbon: Glidepath to Net Zero for Airports

Alexis Ballif, Managing Director, Transport & Amor Boufath, Director, Asset Management, **Ardian**

1115 Panel: Renewables Platforms as an investing strategy

- Australia vs ROW - which global jurisdictions are proving the most attractive?
- Investing in renewables platforms as a strategy to mitigate risk.
- Distributed energy vs large scale renewables

Moderator: Daniel Kemp, APAC Editor, **Infrastructure Investor**

Speakers: James Mittell, Director, Energy, **Actis**

Daniel Timms, Managing Director & Head of Asset Management, **Igneo Infrastructure Partners**

Will McIndoe, Executive Director, **Morrison**



1205 Panel: The future of infrastructure investing is digital

- The intersection of AI & digital: What opportunities does AI unlock in the digital space?
- What's different about digital infrastructure investment in Australia vs. other jurisdictions
- How will digitalisation further drive decarbonisation and help mitigate risks in investing in the energy transition?

Moderator: Judi Seebus, Contributing Editor, **Infrastructure Investor/PERE**

Speakers: Pauline Thomson: Head of Data Science, **Ardian**
John Lucas, Regional Leader, Investments, **Quinbrook Infrastructure Partners USA**

1245 Lunch & Networking

1345 Panel: Australian LPs investing strategies – onwards and upwards outbound?

- How are Australian LPs increasing their outbound capabilities?
- How are LPs thinking about direct investing and co-investments vs funds?
- Infrastructure vs other private markets - is it taking over property?

Moderator: Judi Seebus, Contributing Editor, **Infrastructure Investor/PERE**

Speakers: Mark Hector, Head of Infrastructure, **Aware Super**
Haydn Board, Associate Infrastructure Investments, **CBUS Super**
James White, Acting Head of Infrastructure & Timberland, **Future Fund**
Desmond Goh, Investment Manager, Unlisted Assets, **HESTA**
Matthew Dickson, Senior Manager, Infrastructure Investments, **Rest**

1435 Presentation

Speaker: Ethan Koh, Head of Global Research Operations, **PEI**

1445 Panel: Impact Investing in the Infrastructure Context

- How can managers demonstrate real impact with their infrastructure investments?
- How are mandatory sustainability regulations poised to shape the asset class?
- Nature based solutions as an impact investing opportunity.

Moderator: Sarah Blankfield, Manager, Member Relations, **GRESB**

Speakers: Harini Harini Warrier, Associate Director, Investments, **CEFC**
Angela Karl, Head of Energy Transition, **HMC Capital**
Catherine Lloyd, Principal, Head of Infrastructure Asia Pacific, **Mercer**

1530 Break



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1600 Panel: Spotlight on Battery Storage

- Battery storage in Australia – what is its competitive advantage?
- Costs of battery storage, have costs come down sufficiently to encourage large scale investment?
- What are the potential returns, and the role of government incentives in the sector?

Moderator: Adrian Best, Consultant, AJB Advisory

Speakers: Andrew Wegman, Managing Director - Finance & Investment, **Akaysha Energy**

Becky Sung, Assistant Portfolio Manager, **Aware Super**

Brian Restall, Regional Leader, Investments, **Quinbrook Infrastructure Partners**

Australia

1645 Panel: Offshore investors take on Australia

- How are international investors viewing the local market compared to other developed jurisdictions?
- Operating assets in Australia, what are the challenges and risks that they face?
- Accessing deals – how competitive is the current market for foreign players to bid for deals, are they at competitive disadvantage?

Moderator: Tom Taylor, Reporter, **Infrastructure Investor**

Speakers: Jiroo Eoh, Department Head, **ABL Life Insurance**

Lidia Slaven, Investment Manager, Infrastructure Portfolio, **ADIA**

Chloé Brayne, Senior Director, Investment Director **CDPQ**

Speaker, **Dexus**

1730 Cocktail Reception