

Infrastructure  
Investor  
Network

## Australia Forum

# Infrastructure Investor Network Australia Forum

22<sup>nd</sup> October 2024, Sofitel Hotel, Melbourne

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The image shows the HM Capital logo, which consists of the letters 'HM' in white and 'Capital' in a smaller, gold-colored font, all set against a black rectangular background with a gold horizontal bar at the bottom.

Monday 21<sup>st</sup> October (Times in AEST) Melbourne

1800: Welcome Cocktail Reception (TBC)

## Tuesday 22<sup>nd</sup> October (Times in AEST) Melbourne

### 0830 Registration & Networking

### 0900 PEI Opening Remarks

### 0905 Keynote Fireside Chat

### 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**

Ken Wong, Head of Asia Pacific, **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

**Speaker, 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:** 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**

**Speaker, 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:** Angela Karl, Head of Energy Transition, **HMC Capital**

Catherine Lloyd, Principal, Head of Infrastructure Asia Pacific, **Mercer**

#### 1530 Break

#### 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



For more information regarding the event, please email [andrew.w@pei.group](mailto:andrew.w@pei.group)

- 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, Investment Director, Investment Director **CDPQ**

### **1730 Cocktail Reception**