



**Infrastructure
Investor
Network**

Global Summit

2023 Agenda

Monday 20 March

[Emerging Markets Forum](#) | [ESG & Sustainability Forum](#) | [Digital Infrastructure Forum](#)

Tuesday 21 March

[Global Investor Forum – Day one](#)

Wednesday 22 March

[Global Investor Forum – Day two](#)

Thursday 23 March

[Investor Council](#) | [Infrastructure Debt Forum](#) | [Energy Transition Forum](#)

Ed Pallesen, Managing Director & Co-Head of Infrastructure, **H.I.G. Capital**
Mark White, Head of Real Assets, **Albourne Partners**

Moderated by: Irene Mavroyannis, Managing Partner, Private Capital Advisory, **Sera Global**

13:10 – 14:10

Networking lunch

Stream A	Stream B
<p>14:10 - 14:50</p> <p>Panel: Finding the keys to success for infrastructure debt and financing</p> <ul style="list-style-type: none">• How are debt funds thriving as liquidity leaves the market?• Examining the success blueprint for equity players crossing over into the credit space• Struggles with ESG and sustainability reporting: how could standardisation help? <p>Annette Bannister, Managing Director, MetLife Investment Management Jean-Francis Dusch, CEO, Edmond de Rothschild UK, CIO Infrastructure Debt, Edmond de Rothschild AM UK Simon Hayden, Senior Managing Director, European Head of Blackstone Credit Sustainable Resources Group, Blackstone Credit Patrick Trears, Partner & Global Head of Infrastructure Debt, Ares Management Garret Tynan, Managing Director, KBRA</p> <p>Moderated by: Irina Frilova, independent non-executive Director & former Head of Infrastructure, PGGM</p>	<p>14:10 - 14:50</p> <p>Panel: The transportation bounce-back: stalling or in full flow?</p> <ul style="list-style-type: none">• How pronounced has the bounce-back for transportation assets been since Covid-19 restrictions have softened?• How is a likely incoming recession going to impact this?• Transportation assets of the future: how investors must adapt to find value as this sub-sector blends with other newcomers <p>Juan Angoitia, Co-Head Europe and Senior Managing Director of the Infrastructure team, ARDIAN Gonzalo Cantabrana Fernández, Sector Lead and Senior Director, Infrastructure and Project Finance Ratings, S&P Global Gisele Everett, Senior Managing Director and Head of Americas, OMERS Infrastructure Dominic Helmsley, Head of Core Infrastructure, abrdn Jamie Storrow, Managing Director & Head of Infrastructure, Northleaf Capital Partners</p> <p>Moderated by: Alexandra Dimsdale Gill, Partner, Clifford Chance</p>
<p>14.50 - 15.30</p> <p>Panel: Digging into the details: best approach and methods for energy assets</p> <ul style="list-style-type: none">• Net-zero mega-funds, increased specialisation and increasing legislation: what's shaping the energy assets of the future?• Merits of debt and equity funds when it comes to pricing and regulatory factors affecting energy assets• PPAs, merchant power and taking on risk – weighing up the key considerations for renewables investment models <p>Alex Brierley, Co-Head of Octopus Energy Generation, Octopus Group Juergen Pinker, Senior Managing Director, Blackstone Kai Rintala, Managing Director, Taaleri Energia</p>	<p>14.50 - 15.30</p> <p>Panel: Combating present and future challenges in digital infrastructure</p> <ul style="list-style-type: none">• Protecting your portfolio against technology risk in a rapidly developing sector• Achieving sustainability and energy efficiency in data centres• Overcoming labour shortage issues in fibre rollout <p>Ingrid Edmund, Head of Portfolio Management & Financing, Columbia Threadneedle Investments Omar Jaffrey, Managing Partner and Sole Founder, Palistar Capital LP Ted Manvitz, Managing Director, Grain Management Steven Marshall, Chairman, Cordiant Rick Shrotri, Managing Partner, Digital Alpha</p>

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Elena Savostianova, Managing Partner, **Ember Infrastructure**
Albena Vassileva, Executive Director, **IFM Investors**

Moderated by: Isabel O'Brien, Reporter, Americas, **Infrastructure Investor**

Moderated by: Uwe Fleischhauer, Managing Director, **YIELCO Investments**

15:30 – 16:00

Coffee and networking

16:00 – 16:40

LP panel: Smart strategy selection and risk assessment

- Finding best value in the mid-market and beyond
- Are investors diversified to different types of risk sufficiently?
- The strategic importance of disentangling infrastructure from private equity and other asset classes in your portfolio

Prasad Gadkari, Executive Director & Chief Strategy Officer, **National Infrastructure Investment Fund (NIIF)**

Henrik Lundin, Chief Investment Officer, **IMAS Foundation**

Kate Roscoe, Managing Director, Infrastructure Equity, **Manulife**

Christian Wiehenkamp, Chief Investment Officer, **Perpetual Investors**

Moderated by: Surinder Toor, Managing Partner, **Arjun Infrastructure**

16:40 – 17:20

Polling debate: The future of infrastructure

- What will prove the biggest influence on the changing definition of infrastructure in the next five years?
- Which sub-sector will emerge from the recession and inflationary environment as the biggest 'winner'?
- Which type of strategy will prove the most popular with institutional and private investors?

Erik Bottnevik, Director, Country Lead Norway, **Infranode**

Karen Dolenc, Partner, **Ancala Partners**

Emil W. Henry, Jr., Chief Executive Officer, **Tiger Infrastructure Partners**

Adrian Mucalov, Partner, Head of Long Life Infrastructure, **Actis**

Cedric Lucas, Managing Director, **Goldman Sachs Asset Management**

Moderated by: Mitch Barltrop, Managing Director, **FTI Consulting**

17:20 – 18:00

Closing keynote: Wirecard: Lessons from the spectacular collapse of a tech giant

Dan McCrum, Investigative Reporter, **Financial Times**

18:00 – 18.10

Chair's summary and close of day one

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Ali Miraj, Managing Director, Infrastructure Finance, **ING Bank**

18:10

Paul Hastings Official Drinks reception

Infrastructure Investor Lab

In the Beletage Room, running parallel to the Global Investor Forum

11:20 - 11:40

Fiona Hill: deep-dive interactive Q&A with our keynote

Fiona Hill, Senior Fellow, Foreign Policy, **The Brookings Institute** *in conversation with* Kalliope Gournitis, Deputy Editor, **Infrastructure Investor**

12:30 - 12:50

The Evolution of Allocation Strategies in Infrastructure: Why, What and How

Tom Sumpster, Head of Private Markets, **The Phoenix Group** *facilitated by* Eugene Zhuchenko, Director & Founder, **ETORE Advisory**

14:40 - 15:00

NewVest: Private market disruption fireside chat and interactive Q&A

Edward Talmor-Gera, Founding Managing Partner & CEO, **NewVest** *facilitated by* Adam Smallman, Director of Membership Programmes, **PEI Group**

16:00 - 16:20

Dan McCrum: deep-dive interactive Q&A with our keynote

Dan McCrum, Investigative Reporter, **Financial Times** *facilitated by* Nicholas Lockley, Director, **PEI Group**

Wednesday 22 March

Global Investor Forum

08:45 – 08:50

Chair's welcome back

Ali Miraj, Managing Director, Infrastructure Finance, **ING Bank**

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- Why are these capabilities becoming of increasing importance for investors selecting their managers?

Chris Beall, Managing & Founder, **NOVA Infrastructure**

Andrew Honan, Head of Infrastructure and Sustainable Investing, **MML Capital Partners**

Ross Posner, Managing Partner, **Ridgewood Infrastructure**

Vincent Policard, Partner, Co-Head of European Infrastructure, **KKR**

Mark Prybutok, Managing Director, **GI Partners**

Moderated by: Helene Schütrumpf, Director, **Ely Place Partners**

15:00 – 15:20

Fireside Chat: Differentiation and driving value within infrastructure

Pooja Goyal, Partner and Chief Investment Officer of Carlyle Global Infrastructure, **Carlyle**

Moderated by: Isabel O'Brien, Reporter, Americas, **Infrastructure Investor**

15:20 – 16:00

Panel: Infrastructure's influential role in a changing wider world

- Assessing responsibilities and adaptability when it comes to climate
- Social issues – what can investors and fund managers do to make a positive difference in a world of rapidly evolving social dynamics?
- Cost of living, economic turmoil and geopolitical tensions – striking the right balance in uncertain times

Christoph Gisler, Head, Infrastructure Equity, **Swiss Life Asset Managers**

Gideon Tilburgs, Director, Head of Benelux, **Equitix**

Beth Watkins, Investment Director, **Gravis**

Nicolas Wyss, Head Investment Management, **Reichmuth & Co.**

16:00 – 16:20

Coffee and networking

16:20 – 17:00

Panel: Defying gravity? Outlook for infrastructure valuations

- Why are infrastructure valuations staying higher than anticipated? Will it remain this way?
- How might the cost of debt have a significant impact on this in the near future?
- Which infrastructure sub-sectors might feel the impact of changing valuations most severely?

Timothy Keeling, Director, Infrastructure & Renewable Resources, **BCI**

Recep C Kendircioglu, Head of Infrastructure Investments, **Manulife**

Kerron Lezama, Senior Director, **CBRE Investment Management**

Hamish Mackenzie, Head of Infrastructure, **DWS Infrastructure**

Maciej Taraciuk, Senior Investment Director, **Amber Infrastructure**

Moderated by: Rishi Karir, VP of Sales, **Mercatus, a State Street Company**

17:00 – 17:40

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