

# New York Summit

## Virtual experience 2020

December 2-3 | Available anywhere (EST)

Co-host:

Women in  
Infrastructure  
New York Forum  
Virtual Experience 2020

## Agenda

### Day 1 | December 2nd

- 9:05am **LP think tank (invitation-only)**  
**Closed Door | OFF THE RECORD | DO NOT RECORD**
- How has Covid-19 impacted on your current investments, and will it have a longer-term impact on your future investment strategy?
  - Compared to this time last year, are ESG considerations more/same/less important to your investment decisions?
  - Do you think the new administration understands sufficiently the positive role of pension funds in investing in US infra and what more needs to be done to get that message across?

FACILITATOR:

**Lawrence Slade**, CEO, **GIIA**

- 9:05am **GP Think Tank: Sustainable Infrastructure (Invitation-only)**  
**Closed Door | OFF THE RECORD | DO NOT RECORD**
- How can increased investments in sustainable infrastructure address the social and economic issues intensified by the Covid-19 pandemic?
  - How can identifying infrastructure as an asset class help unlock private capital for sustainable development?
  - How can measurement and standards help ensure the success of a project both financially and for the communities where they are built?

FACILITATORS:

**Ronald D. Factor**, President & CEO, **Airis**

**Daniel Feitelberg**, Principal, **Infrastructure Advisory and Higher Education Advisory Leader, KPMG**

**Kate Newman**, Vice President, **Forest and Freshwater Public Sector Initiatives, World Wildlife Fund**

**Jim Pass**, Senior Managing Director, **Guggenheim Partners**

**Jeff Scheferman**, Executive Vice President, **North America of CCR Airports, CCR**

**Niniane Tozzi**, Senior Consultant, **Sustainability and Climate Change, Mott MacDonald**

**Lorena Zemp**, Chief Operating Officer, **Global Infrastructure Basel Foundation (GIB)**

- 9:50am **PEI welcome & chairman's opening remarks**

PEI:

**Seth Kerker**, Director of Events - Americas, **PEI**  
**CHAIRMAN**

**Mark Weisdorf**, Managing Partner, **Mark Weisdorf Associates, LLC**

- 10:00am **Keynote interview**

How will the presidential election impact the funding of US Infrastructure?

MODERATOR:

**Jordan Stutts**, Senior Writer, **Private Markets, PEI**

KEYNOTE SPEAKER

**Dr. Morteza Farajian**, Executive Director, **Build America, U.S. Department of Transportation**

- 10:40am **Limited partner roundtable discussion**  
**Closed Door | OFF THE RECORD | DO NOT RECORD**

- Findings from the "LP Think Tank"
- The Impact of Covid-19
- Climate change impact, resiliency and investment
- What is the outlook for an infrastructure plan with incoming administration in Washington? Does it totally depend on the outcome of the senate races, or does the need for recovery post virus / vaccine bode well for a bi-partisan infrastructure stimulus plan?
- Are LPs less keen on seed assets?
- Which strategies are performing well and why?

MODERATOR:

**Mark Weisdorf**, Managing Partner, **Mark Weisdorf Associates, LLC**

PANELISTS:

**Petya Nikolova**, Head of Infrastructure, **New York City Retirement System, Office of the Comptroller**

**Carolyn Hansard**, Senior Director & Portfolio Head, **Energy, Natural Resources & Infrastructure, Teacher Retirement System of Texas**

**Howard Stern**, Managing Director, **Northwest Mutual Capital**

- 11:25am **Networking break**

11:35am **Digital infrastructure is an imperative**  
Digital infrastructure has fallen dramatically in favor of investors as the next critical piece of how economies function. What are the leading trends, risks and opportunities?

MODERATOR:

**Kanan Joshi**, Executive Director, **Upper Bay Infrastructure Partners**

PANELISTS:

**Peter Gray**, Director, **OMERS**

**Dylan Foo**, Managing Director, **Apollo**

**Kevin Smithen**, Managing Director, **Global Head of Strategy and Capital Formation, Digital Colony**

**Mohamed El Gazzar**, Partner, **I Squared Capital**

**Jessica Thompson**, Executive Director, **Debt Investments**, Deputy Head of North America Infrastructure Debt, **IFM Investors**

1:10pm **Mid-day networking break**

1:45pm **Fireside chat: a more integrated approach to sustainability**

MODERATOR:

**Susan Mac Cormac**, Partner, **Morrison & Foerster**

PANELIST:

**Chris Leslie**, Global Head of Sustainability, **Senior Managing Director, Macquarie Infrastructure and Real Assets (MIRA)**

12:25pm **Infrastructure debt**

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- Interest in infrastructure debt strategies continues to grow
- What is the best way to finance infrastructure?
- Which subsectors are most attractive and why?
- What types of cash yields can investors expect?

MODERATOR:

**Peter Sipsas**, Managing Director, **Head of Credit, Jensen Partners**

PANELISTS:

**Jeetu Balchandani**, Managing Director, **Global Head of Infrastructure Debt, BlackRock**

**Vivien de Gunzburg**, Founder & Managing Partner, **Ceres Infrastructure Asset Management**

**Jennifer Powers**, Partner & Chair, **GIP Credit, Global Infrastructure Partners**

2:20pm **GP roundtable**

Early signs indicate that the asset class has proved to be resilient during the global pandemic; will private infrastructure be one of COVID-19's winners?

MODERATOR:

**Kyle Alexander**, Managing Director, **State Street**

PANELISTS:

**Mark A. McComiskey**, Partner, **AVAIO**

**Todd Bright**, Partner, **Head of Private Infrastructure Americas, Partners Group**

**Kevin Genieser**, Senior Partner, **Antin Infrastructure Partner**

**Michael Albrecht**, Managing Partner, **Ridgewood Infrastructure**

3:10pm **Breakout series**

### Track A | Transportation

- What are investors doing to return these assets back to good health?
- Can airports get their mojo back?
- What companies in this sector are thriving in the current environment?
- What are the capital markets and other financing sources' outlook on transportation businesses?

MODERATOR:

**James A. Abate**, Managing Director & Chief Investment Officer, **Centre Asset Management**

PANELISTS:

**Mike Discenza**, Chief Financial Officer, **Transurban North America**

**Emmett McCann**, Managing Director and Co-Portfolio Manager, **Oaktree Capital Management**

**Marietta Moshiasvili**, Chief Executive Officer and Managing Partner, **Upper Bay Infrastructure Partners**

### Track B | InfraTech

- Why is InfraTech gaining so high importance now?
- What regions of the world currently offer the highest growth potential for InfraTech?
- Where do you envisage InfraTech in 5 years and in 10 years?

MODERATOR:

**Caroline Abramo**, CIO and Founder, **Pana LCE**

PANELIST:

**Jeffrey Altman**, Senior Advisor, **Finadvice AG**

**Brian Barlow**, Co-Founder & Co-CEO, **Sidewalk Infrastructure Partners**

**Charles Cherington**, Managing Partner, **Ara Partners**

**Paul Manias**, Managing Partner, **Climate Innovation Capital**

### Track C | Infra secondaries

Why are single-asset secondaries booming?

MODERATOR:

**Pablo Caló**, Partner, **Cross Functional, Fairview Capital Group**

PANELIST:

**Mark Bhupathi**, Managing Director, **Strategic Partners**

**Scott Litman**, Managing Director, **Infrastructure Investments, GCM**

**Dominik von Scheven**, Senior Investment Manager, **HSBC Global Asset Management HSBC Alternative Investments / Infrastructure Equity**

3:55pm **Networking break**

## 4:15pm **Renewable energy and sustainability**

### Chatham House Rules | RECORD

- What are the current major investment opportunities and risks? How will the presidential election change the risks and opportunities that fund managers face?
- What impacts has COVID-19 had on the investment landscape?
- What needs to be done to stimulate further private investment in renewable energy?
- What do you see on the horizon for the US renewable market beyond COVID-19 and the

presidential election?

#### MODERATOR:

**Elizabeth Sluder**, Partner, **Morrison & Foerster**

#### PANELISTS:

**Keith Derman**, Partner and Co-Head, **Ares Infrastructure and Power**, **Ares Asset Management**  
**Pooja Goyal**, Partner and Head of Renewable and Sustainable Energy, **The Carlyle Group**  
**Scott Jacobs**, CEO & Co-Founder, **Generate Capital**  
**Rick Needham**, Partner, **Energy Sector Lead**, **The Rise Fund**, **TPG**

## Day 2 | December 3rd

### :05am **Women's networking roundtable (Invitation-only)**

- How does infrastructure compare to other asset classes? How does gender diversity within infrastructure compare to other asset classes?
- How can fund managers meet LP expectations as it relates to diversity?
- Do management strategies meet LP expectations in today's climate?
- Business development and effective networking

#### FACILITATOR:

**Sarah Fitts**, Partner, **Schiff Hardin LLP**; **Steering Committee Member**, **Women's Infrastructure Network**

#### MODERATOR:

**Jordan Stutts**, Senior Writer, **Private Markets**, **PEI**

#### PANELISTS:

**Dr. Michael K. Dorsey**, CEO & Co-Founder, **Around the Corner Capital (USA)**, **Managing Director**, **IberSun (Spain) & LP Pahal Solar**  
**Andrew Rodriguez**, CEO & Chief Investment Officer, **Change Finance**

### 9:55am **PEI welcome**

**Seth Kerker**, Director of Events - Americas, **PEI**

### 10:00am **Spotlight Discussion: Environmental Justice**

- Energy and the transition to clean
- ESG with a focus on the S

### 10:40am **ESG focused recovery beyond renewables**

- Addressing racial and economic inequalities through infrastructure investment
- Carbon emission reduction
- How do we make our current infrastructure last longer?

#### MODERATOR:

**Rick Walters**, Director Infrastructure, **GRESB**

#### PANELIST:

**Adam Bernstein**, Managing Director, **North Sky Capital**  
**Jim Pass**, Senior Managing Director, **Guggenheim Partners**

### 11:30am **Networking break**

## 11:50am **Breakout series**

### **Track A | Fundraising in a digital age**

- How did digital fundraising perform this year?
- Best practices: what has worked well, and what is likely to continue when we return to 'normal'?
- What have been digital fundraising's biggest challenges?
- What strategies have resonated with LPs in 2020?

#### PANELIST:

**Ray Albright**, Senior Managing Director, **Keel Harbour**

**Michael Bane**, Head of US Investor Relations, **Ardian**

**Leslie Wolff Golden**, Managing Director, **Digital Colony**

### **Track B | US P3s**

- Is the post pandemic US market primed for PPPs?
- What's the best way to navigate North American PPP?

#### PANELISTS:

**Charles-Henry Lecoite**, Global Co-Head and Head of Infrastructure Debt, North America, **Legal & General Investment Management America**  
**Martin Klepper**, Chairman, **Fengate Capital Management**  
**Ryan Gow**, M.Fin., CFA, Director, **Fiera Infrastructure**

### **Track C | Social infrastructure**

Why these investments make sense for your infrastructure allocations

#### MODERATOR:

**Zak Bentley**, Senior Reporter, **Infrastructure Investor**

#### Panelist:

**Carolyn Arida**, Director & Head of Utilities, **Harrison Street Social Infrastructure Fund**

12:35pm **Chairman's closing remarks**

12:40pm **Women in Infrastructure networking break**

## Women in Infrastructure New York Virtual Forum

December 3rd | 1:00 - 5:00pm

1:00pm **PEI welcome & chairwoman's opening remarks**

CHAIRWOMAN:

**Julia R. Balas**, Partner, **Morrison Foerster**

1:15pm **Keynote Leadership Discussion**

MODERATOR:

**Sarah Pringle**, Editor, **PE HUB**

KEYNOTE SPEAKER:

**Mélanie Biessy**, Senior Partner and Chief Operating Officer, **Antin Infrastructure Partners**

1:55pm **Visions, insight's and perspectives**

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- How can private investment be leveraged to create quality sustainable infrastructure?
- Has it been hard for women owned firms to raise money during the pandemic? Have you noticed a growing effort to increase diversity in private infrastructure?
- How has the pandemic altered your investment decisions? Identifying new investment opportunities? What are the most attractive opportunities?
- How will the outcome of presidential election impact the funding of US Infrastructure? What are your biggest concerns? What are you potentially looking forward to?

MODERATOR:

**Anuja Selvakumar**, AVP, **Business Development - Private Infrastructure, Partners Group**

PANELISTS:

**Andrea Mody**, Co-head & Chief Operating Officer, **MIGS Funds, Head of Alternatives, Client Solutions Group Americas, Managing Director, Macquarie Infrastructure and Real Assets (MIRA)**

**Christy Silvester**, Portfolio Manager, **Credit, Global**

**Infrastructure Partners**

**Elena Savostianova**, Managing Partner, **Ember Infrastructure**

2:45pm **Networking break**

3:05pm **Keynote fireside chat**

KEYNOTE SPEAKER:

**Anne Valentine Andrews**, Deputy Head of Real Assets, **BlackRock**

MODERATOR:

**Sasha Jensen**, CEO, **Jensen Partners**

3:45pm **Keynote leadership discussion**

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MODERATOR:

**Karishma Vanjani**, Reporter, **PE HUB**

PANELIST:

**Angela Rodell**, CEO, **Alaska Permanent Fund Corporation**

**Marion Calcine**, Chief Investment Officer - Infrastructure, **Ardian**

4:40pm **Chairwoman's closing remarks**

5:00pm **"Want to Meet" Designated Meeting Time**