

# The Year Ahead Deep Dive

Wednesday 20 January  
14:00 GMT (09:00 EST)

**The world's infrastructure investors share their thoughts on what to expect from 2021.**

14:00	Welcome from Infrastructure Investor and introduction to the Global Passport
14:10	<b>Speed networking</b> Get to know your fellow Passport holders via our quickfire 4-minute speed networking sessions. Participate in a series of randomly generated meetings to help you meet your peers.
14:30 [Panel]	<b>Vaccines and the prospect of a post-pandemic recovery</b> <ul style="list-style-type: none"><li>• The macro picture: Putting today in the context of previous crises</li><li>• Assessing the impact of a vaccine on interest rates and the prospect of inflation</li><li>• Which sectors are set to bounce back soonest and why?</li><li>• How the asset class can benefit from a loosening of social restrictions and an improved outlook</li></ul> <p>Moderator: Adam Smallman, Director – Membership Programs, PEI Media Group</p> <p>Panellists: Jason Fletcher, Chief Investment Officer, London Collective Investment Vehicle (LCIV) Vivian Nicoli, Managing Director, Infrastructure, Europe, CDPQ Michael Ryder, Senior Managing Director and Head of Americas, OMERS</p>
15:00	<b>Meet the speakers Q&amp;A and networking</b> Discuss the previous session with the speakers and put your questions to them face-to-face.



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15:20	<b>Stretch break</b>
15:25 [Panel]	<p><b>What will a Biden administration mean for infrastructure spending?</b></p> <ul style="list-style-type: none"><li>• Getting shovel-ready projects underway</li><li>• Funding and financing the stimulus and more long-term projects</li><li>• Will the new administration take the lead on climate change?</li><li>• Does the US really need a renewables stimulus?</li></ul> <p>Moderator: Jordan Stutts, Senior Writer, Infrastructure Investor</p> <p>Panellists: Anne Valentine Andrews, Deputy Head of Real Assets, BlackRock DJ Gribbin, Senior Operating Partner, Stonepeak Infrastructure Partners Mark McComiskey, Partnet, AVAIO</p>
15:55	<p><b>Meet the speakers Q&amp;A and networking</b></p> <p>Discuss the previous session with the speakers and put your questions to them face-to-face.</p>
16:10	<b>Stretch break</b>
16:15 [Presentation]	<p><b>Three types of infrastructure portfolio analysed in the light of covid</b></p> <ul style="list-style-type: none"><li>• Comparing a balanced, GDP exposed and contracted asset portfolio</li><li>• Analysis of each portfolio's performance during the pandemic</li><li>• When can we expect a recovery?</li></ul>
16:45 [Panel]	<p><b>The Crystal Ball session – Predicting the future of infrastructure investment</b></p> <p><i>Infrastructure Investor</i> presents some bold forecasts for year ahead. This is followed by specific predictions from leading industry participants- who</p>



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	<p>have agreed to revisit them at the Global Summit, followed by a vote from the audience.</p> <p>Host: Bruno Alves, Senior Editor, Infrastructure Investor</p> <p>Speakers: Bruno Candes, Partner, InfraVia Capital Partners Andrew Claerhout, Partner &amp; Co-Head of Infrastructure, Searchlight Capital Partners</p>
17:25	<p><b>Group networking</b></p> <p>Discuss the sessions from the Deep Dive in small groups and come up with your own predictions for 2021. Then report back to the whole audience and see what they think of your group's ideas.</p>
18:00	<p><b>Close of event</b></p>

Part of the [Infrastructure Investor Global Passport](#), a new way for industry leaders to stay connected to the market, meet investors, secure capital commitments, and gain a strategic edge throughout the year.

FIND OUT MORE



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