Day 1: Tuesday, November 16

NY 08.30–08.45 Welcome from Infrastructure Investor

NY 08.45–09.00 Chair’s welcome

NY 09.00–09.40 The infrastructure scorecard: Assessing how the Biden administration is doing so far

- Discussing the funding model and whether viable alternatives existed
- Does the US really need a renewables stimulus?
- Getting the framework working: What the investor community needs to see

Henry Cisneros, Chairman, American Triple I Partners
Alex Darden, Partner, EQT
Martin Klepper, Chairman, Fengate Capital Management

NY 09.40–10.20 Legislative and regulatory views on the US infrastructure market

- A policy update on the Bipartisan Infrastructure Framework
- State-level developments on introducing or upgrading P3 legislation
- CFIUS- compliance for foreign investors in US infrastructure

Morteza Farajian, Executive Director, DOT/Build America Bureau
DJ Gribbin, Senior Operating Partner, Stonepeak Infrastructure Partners
Richard A. Juliano, General Counsel, Managing Director, Contractors Division, Managing Director, P3 Division, American Road & Transportation Builders Association
Robert Keough, Managing Director, Head of Infrastructure, JLC Infrastructure
Tom Osborne, Executive Director, IFM

NY 10.20–10.50 Keynote: An industry leader sets out their roadmap for the infrastructure asset class

- Why the Biden administration’s infrastructure plan is a crucial first step
- Methods for mobilizing private capital investment
- How to implement asset recycling in the US

Anne Valentine Andrews, Managing Director, Global Head of Real Assets, BlackRock

Learn more at: peievents.com/en/event/infrastructure-investor-new-york-forum/
NY 10.50–11.20  Coffee break

NY 11.20–12.00  Defining the energy transition: Debating the changing shape of the North American energy market

- Managing the transition to clean energy and what it means for funds and investors in the space
- Making sure the right team and expertise is in place for a change of strategy
- How to get investors comfortable with executing a net-zero product

Keith Derman, Co-Head, Infrastructure & Power, Ares
Grant Hodgkins, Portfolio Manager, Infrastructure & Natural Resources, BCI
Jim Hughes, Managing Partner, Energy Transition, Encap Investments
Edwina Kelly, Managing Director, Sustainable Energies Group, CPPIB America, Inc.
Elena Savostianova, Managing Partner, Ember Infrastructure

NY 12.00–12.40  Fundraising in 2021-22: Getting back on the road

- Comparing virtual and physical fundraising results
- How investors feel about fundraising in a hybrid era
- Can new entrants or products still raise money now?

Isela Bahena, Managing Director, Private Infrastructure, Nuveen Real Assets and Infrastructure
Kelly DePonte, Managing Director, Probitas Partners
Mark Weisdorf, Weisdorf Associates, LLC

NY 12.40–14.00  Lunch break

NY 14.00–14.40  Assessing the state of the P3 market in North America

- State and local action: Streamlining the tendering and approval process
- Federal assistance: Private activity bonds, TIFIA loans and similar instruments
- Opening the floodgates: Industry views on unlocking private investment

Michael Bennon, Managing Director, Stanford Global Projects Center
Mark Melson, Chief Investment Officer, Star America Infrastructure Partners
Mansi Patel, Sr. Director, Infrastructure & Project Finance, Americas, MetLife Investment Management
Nicolas Rubio, Partner, Chief Executive Officer Americas, Meridiam Infrastructure

NY 14.40–15.20  Less renewable? Exploring the darker side of the energy transition

- Batteries, solar panels and wind turbines- what can currently be recycled?
- How the solar production boom has outpaced its recycling infrastructure
- Advancing a circular economy in the energy transition space

Jim Hughes, Managing Partner, Energy Transition, Encap Investments
Tim Short, Managing Director, KKR
Eugene Zhuchenko, Founder and Director, ETORE Advisory

NY 15.20–15.50  Coffee break

NY 15.50–16.30  The plan for transportation infrastructure in the US

Learn more at: peievents.com/en/event/infrastructure-investor-new-york-forum/
• More P3s and where the development will happen: Ports, roads, airports and more
• The recovery of toll roads: More managed lanes, demand data and the future procurement process
• Undervalued assets and buying opportunities for transport investors

Jed Freedlander, Managing Partner & Head of Business Development, **Phoenix Infrastructure Group**
John Mar, Partner, **First Sentier**
Emmett McCann, Managing Director, **Oaktree**
Frank Sacr, Interim Executive Director, **Gateway Program Development Corporation**

NY 16.30–17.10  **Digital and smart infrastructure: Discussing risk and opportunity across the sector**

• FTTH- still the key investment opportunity or getting overheated?
• Beyond fiber, towers and data centers: New areas of digital examined
• Driving growth and monetizing total addressable market: Key questions for investors to ask of management teams

Dylan Foo, Senior Partner, **Apollo Global Management**
Brian McMullen, Senior Managing Director, **Stonepeak Infrastructure Partners**
Mark Prybutok, Managing Director, **GI Partners**
Rick Shrotri, Founder, Managing Partner, **Digital Alpha**

NY 17.10–17.40  **The state of play: Examining investor strategies as 2021 draws to a close**

• Top-down institutional preference, changing risk appetites and what gets the CIO interested
• A look at the disparity in investor interest for growth/core+ strategies versus core and supercore
• Balancing the investor portfolio in a post-pandemic environment

Niraj Agarwal, Head of Real Assets, **New Jersey Division of Investment**
Ross Alexander, Portfolio Manager, Infrastructure/Real Assets, **Alaska Permanent Fund Corporation**
Charles-Henry Lecointe, Head of Infrastructure Debt, North America and Global Co-Head Infrastructure Debt Team, **Legal & General Investment Management America**
Alexander Poll, Infrastructure Equity Americas, **Munich Re**

NY 17.40–17.45  **Chair’s wrap up and close of Day 1**

• 1-2-1 video meetings remain available on the virtual platform until 19.00 NY
Day 2: Wednesday, November 17

NY 08.00-09.00 Investor-only Think Tank session (by invite)

Themes include:
- Consolidating manager relationships- separate and managed accounts, co-investments and more
- Creating investment structures and products to suit changing investor portfolio construction
- Alignment of interest issues- management fees, carry structures and assessing performance

NY 09.00-09.15 Chair’s welcome back

NY 09.15-09.45 Keynote interview

NY 09.45-10.00 Market update from Infrastructure Investor

Our reports analyze the current state of the infrastructure market and detail the significant trends affecting the asset class in each quarter. We review 2021 from a fundraising perspective and look ahead to trends for 2022 as the world tries to get back to normal.

NY 10.00-10.40 Midmarket infrastructure- finding value in a rapidly growing segment

- Assessing how new vehicles and spinoffs are moving into the space
- Finding value by location, cap size and strategy
- Is the US midmarket large enough for funds to deploy at the scale they claim?

David Greenblatt, Partner, Basalt Infrastructure  
Alfred Griffin, Senior Managing Director and Head of Generate Credit, Generate Capital

Patrick Manseau, Global Head Private Debt, Barings

Mark McComiskey, Partner, AVAIO

NY 10.40-11.20 Coffee break

NY 11.20-12.00 Exploring energy generation, storage and distribution in the US market

- Using heat-based storage solutions and accumulators to address peak network demand
- How green solutions can supplement existing energy storage
- New storage: Can data centers provide extra storage capacity?

James Berner, Managing Director (GEPF), BlackRock

Todd Bright, Partner, Partners Group

Justin DeAngelis, Partner, Denham Capital

NY 12.00-13.00 Lunch break and close of New York Forum

Learn more at: peievents.com/en/event/infrastructure-investor-new-york-forum/
## Women in Infrastructure Forum preliminary agenda 2021

**Wednesday, November 17**

**NY 13.00-13.10** Chair’s welcome and introduction

**NY 13.10-13.40** Keynote interview: A senior leader in infrastructure outlines their vision for EDI

**NY 13.40-14.00** How is infrastructure doing on equality, diversity and inclusion?

- Making diversity a business imperative
- Driving better results through greater diversity
- How does gender diversity within infrastructure compare to other asset classes?

**NY 14.00-14.45** Coffee break

**NY 14.45-15.45** Interactive Round Tables

- Doing business remotely and the impact on fundraising
- Climate change and sustainability: Making sense of net zero, the SDGs and COP26
- Adapting asset management capabilities to manage through disruption
- How human capital experts are driving change in their organizations

- **Pooja Goyal**, Partner and Co-Head of the Infrastructure Group, **The Carlyle Group**
- **Laurie Mahon**, Vice Chair, Investment Banking, **CIBC World Markets Corp**

**NY 15.45** Close of conference and Chairperson’s closing remarks