

Infrastructure Investor Japan Korea Week

7 December

**Infrastructure Investor
Seoul Forum**
In-person, Conrad Seoul

8 December

**Infrastructure Investor
Seoul Forum &
Infrastructure Investor
Tokyo Forum**
Online

9 December

**Infrastructure Investor
Tokyo Forum**
In-person, Palace Hotel,
Tokyo

Infrastructure Investor Seoul Forum

Tuesday 7 December, In-person, Conrad Hotel, Seoul
Simultaneous translation in Japanese, Korean and English

12:00 **Lunch & Networking**

13:30 **Keynote Panel**

- Post pandemic allocation - where should Korean LPs invest?
- How have infrastructure assets performed over the past 18 months?
- Which sectors are recovering the quickest post pandemic?

Speaker: Alastair Hall, Senior Managing Director, **OMERS Infrastructure**

14:15 **Keynote Presentation**

Speaker: Adrian Mucalov, Partner, **Actis**

14:45 **Panel: Infrastructure growth sectors**

- Post pandemic winning sectors – does digital remain the most attractive sector?
- How do newer sectors such as social infrastructure sit within the investment portfolio?
- Transport – is it making a comeback?

Speaker: Jungmin Lim, Director, **NH Investment & Securities**
Yusun Chung, Private Assets Director, **Schroders**



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For more information visit the [event website](#).

15:30 **Break**

16:00 **Panel: Greenfield Risk and Renewables investing**

- Comparative risk returns for investing in greenfield vs. brownfield
- What are the most active markets for renewable energy investment?
- Where can Korean investors take advantage in disruption in the energy markets?

Speakers: Regina Chung, Vice President, **CIM Group**

17:00 **Korean LP Panel**

- Post pandemic allocation - where are Korean LPs looking to allocate?
- Pre vs Post pandemic sectoral interest – does energy remain a top focus?
- Infrastructure Debt vs Equity investing strategies

Moderator: Andrew Shin, Director, Head of Investment Services, **Willis Towers Watson**

Speakers: Dong Young Kim, Private Capital Team, **TongYang Life Insurance**

Jake Lee, Head of Infrastructure, **Hyundai Marine & Fire Insurance**

Seok Won Lee, Investment Manager, **POBA**

17:45 **Seoul Cocktail Reception**

Infrastructure Investor Seoul Forum & Infrastructure Investor Tokyo Forum

Wednesday 8 December, Online

Simultaneous translation in Japanese, Korean and English

09:00 **Keynote Panel: Seeking strong returns in a post pandemic world**

- Infrastructure Winners and Losers: Where are GPs looking to invest/avoid post pandemic?
- Managing risk in the current environment - country and currency risk
- Investing in transport - is it now time to reconsider the sector?

Moderator: Mark Weisdorf, Managing Partner, **Mark Weisdorf Associates**

Speakers: Gwenola Chambon, CEO & Founding Partner, **Vauban Infrastructure Partners**

Mark Florian, Head of Global Energy & Power Infrastructure, **BlackRock**

Tom Irvine, Managing Director, **Northleaf Capital Partners**

10:00 **Keynote Presentation**

10:30 **Break**

15:00 **Investing in disruption and the energy in transition**

- What are the current disruptive drivers in the sector?
- ESG and renewables - how do they complement each other?
- How to get Japanese and Korean investors comfortable with greenfield risk?

Moderator: Michael Sofer, Principal Consultant, Head of Strategy & Business Solutions, **Frontier Advisors**

Speakers: Simong Ang, First Vice President, **CIM Group**

Isabel Chatterton, Director, **IFC**

Douglas Kimmelman, Senior Partner, **ECP**

Heiko Schupp, Global Head of Infrastructure Investments, **Columbia Threadneedle**

16:00 **Panel: Successfully implementing ESG strategies**

- Successfully aligning infrastructure investing and ESG needs
- How do managers really value ESG? Is it just window dressing?
- Lessons learned from experienced investors

Moderator: Tharshini Ashokan, Reporter, **Infrastructure Investor**

Speakers: Ryuichi Horie, Principal, **CSR Design Green Investment and Advisory**

Joanne Lee, Sustainable Finance Specialist, **WWF**

Gwen Colin, Independent Advisor, **Sustainable Finance**



Infrastructure
Investor

Japan Korea Week 2021

17:00 Panel: Working successfully with Japanese and Korean gatekeepers

- Best practices for engaging with gatekeepers in the post pandemic era
- What are the Do's and Dont's for presenting and pitching funds?
- Risk return appetites amongst local LPs - are these changing? Can higher risk strategies be feasibly pitched?

Speakers: Shigefumi Kuroki, **DBJ Asset Management**

Toru Masuda, Head of Private Equity, **Sumitomo Mitsui Trust Bank**

Akihito Nagata, Chief Portfolio Manager, Alternative & Fund Investment, **Nissay Asset Management**

Shinji Nozu, Managing Director, **Alternative Investment Capital Limited**



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Infrastructure Investor Tokyo Forum

Thursday, 9th December, In-person, Palace Hotel, Tokyo

Simultaneous translation in Japanese, Korean and English

09:00 Keynote Presentation

Speaker: Yoshitaka Todoroki, Managing Director, Private Market Investment Department, **Head of Infrastructure, GPIF**

09:30 Keynote Panel

- Post pandemic allocation - where should Japanese LPs look to invest?
- Core vs Core Plus vs Value Add – what are the best strategies?
- Which infrastructure sectors show the most attractive returns in the current environment?

Speakers: Joost Bergsma, CEO & Managing Partner, **Glennmont Partners**
Karen Dolenc, Partner, **Ancala Partners**
Alastair Hall, Senior Managing Director, **OMERS Infrastructure**

10:20 Presentation

Speaker: Adrian Mucalov, Partner, **Actis**

10:50 Break

11:20 Panel: Infrastructure's expanding investing landscape

- The changing perception and definition of infrastructure what opportunities does it open up for
- Why should Japanese LPs consider unfamiliar sub asset classes?
- How do newer sectors such as in digital and social infrastructure fit within the investment portfolio?

Moderator: Takanori Fukushima, General Manager, **Sumitomo Mitsui Trust Research Institute**

Speakers: Shuichi Hayashida, Head of Japan & Vice Head for South East Asia, **Multilateral Investment Guarantee Agency (MIGA)**

Sohei Shiotani, CIO, **Marunouchi Infrastructure**

Tetsuya Tabata, is Co-Head of Private Equity Investment Team, **Sumitomo Mitsui Trust Bank**

12:05 Lunch Break

14:00 **Panel: Japan's Offshore wind investing opportunity**

- How can institutional capital best get involved in the sector?
- What does recent governmental decarbonisation policy mean for industry growth?
- Offshore wind implications for the grid and transmission line development

Moderator: Kanna Mihara, Senior Vice President, **Macquarie Capital**

Speakers: Shinichi Yasuda, Co-Head of Renewable Finance Team, **Development Bank of Japan**

14:55 **Investing in Digital Infrastructure**

- What is digital infrastructure? Understanding the current digital landscape
- Investing in datacentres
- With rising competition for assets, is the digital market overheated?

Speakers: Nori Matsushita, Head of Japan, **AirTrunk**

15:30 **Break**

16:15 **Panel: Infrastructure Debt Strategies**

- Why investors are increasingly allocating into the asset class
- Is high yielding infrastructure debt the new core infrastructure equity?
- Investing in Infrastructure debt vs other private debt subsectors

Speakers: Shuji Hatsukaiwa, Head of Alternatives Sales & Product, **Schroders**

Toru Inoue, Vice President, **Goldman Sachs**

17:00 **Japanese LP Panel**

- How does infrastructure currently fit within Japanese LPs alternatives portfolios?
- Is infrastructure investing appetite increasing post pandemic?
- Risk appetites amongst investors – are higher risk strategies being considered?

Moderator: Takako Koizumi, Executive Director, **Mitsui & Co Alternative Investments**

Speakers: Tomoya Hori, Director, Private Equity Investment Department, **Japan Post Bank**

Keisuke Okano, Associate Director, **Orix Life Insurance**

Koji Someno, Manager, Alternative Investment Department, **Dai-ichi Life Insurance**

Satoru Tanabe, Head of Infrastructure, **PFA**

17:45 **Tokyo Cocktail Reception**



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