



Infrastructure
Investor

Japan Korea Week 2021

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

9:00 **Arrival coffee break**

9:30 **One to one meetings**

12:00 **Lunch & Networking**

13:45 **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: Brad Kim, Managing Director, **Stonepeak Infrastructure Partners**

14:15 **Keynote Presentation**

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



For programme information:
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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?

Moderator: Elliott Jonghyun Cha, CEO, **Tcha Partners**

Speaker: Yusun Chung, Private Assets Director, **Schroders**

Ayaka Fujiwara, Climate Investment Specialist, **Green Climate Fund**

Woo-sung Jung, Managing Director, **KTB Asset management**

Jungmin Lim, Director, **NH Investment & Securities**

John Walker, **Executive Chairman, Eastpoint Partners**

15:35 Break

16:10 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?

Moderator: Narkjoon Choi, Vice President, **Samchully Asset Management**

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

John Jungho shin, Team head, **KOTAM**

Brian Kim, Founder & CEO, **Brite Energy**

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

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

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

Jiho Park, Head of Infrastructure, **Samsung Life**

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: Joost Bergsma, CEO & Managing Partner, **Glennmont Partners**

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

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

Ryan Roberge, Managing Director, **Stonepeak Infrastructure Partners**

10:00 **Global Infrastructure Debt - Investing across the capital spectrum**

Speakers: Glenn Fox, Head of Infrastructure Debt Investments, **HSBC Asset Management**

Shantini Nair, Senior Product Specialist, **HSBC Asset Management**

10:20 **Q&A Session**

Speakers: Alexandre Broggi, Senior Portfolio Manager, **HSBC Asset Management**

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: Simon Ang, First Vice President, **CIM Group**

Isabel Chatterton, Director, **IFC**

Anand Jagannathan, Senior Partner, **Antin Infrastructure Partners**

Douglas Kimmelman, Senior Partner, **ECP**

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

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

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

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

Jeff Pentland, Managing Director, **Northleaf Capital Partners**

Jo Saleeba, Head of Sustainability, **New Forests**,

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 Don'ts for presenting and pitching funds?
- Risk return appetites amongst local LPs - are these changing? Can higher risk strategies be feasibly pitched?

Moderator: Mitsuhiro Arakawa, Executive Consultant, **Russell Investments Japan**

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**

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 infrastructure investing opportunities

- 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?

Moderator: Yuriy Humber, President, **Humber Group**

Speakers: Tony Nakamura, CEO, **Canadian Solar Asset Management**

Masahiko Kato, Managing Director & Head of Infrastructure Japan, **EQT**

Yasuhiro Ono, **Stonepeak Infrastructure Partners**

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 Presentation

Speaker: Nick Gibson, Founder & General Manager, **Glydways Japan**



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12:35 Lunch break

14:00 Panel: The 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: Yamato Kawamata, Senior Power Market Analyst, **Wood Mackenzie**
Shinya Kotani, Deputy General Manager, **Shinsei Bank**
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?

Moderator: Dan Shulman, Principal, **Shulman Advisory**

Speakers: Masayuki Kurihara, Managing Director, **Envision Digital Japan**
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

Moderator: Takaaki Hoshino, Executive Officer, Head of Global Fund Investment, **DBJ Asset Management**

Speakers: Shuji Hatsukaiwa, Head of Alternatives Sales & Product, **Schroders**
Toru Inoue, Vice President, **Goldman Sachs**
Hironobu Nakamura, Chief Investment Officer, **Asset Management One Alternative Investments**



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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**

17:50 Tokyo Cocktail Reception



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