

## Infrastructure Investor Japan Korea Week 2023

12th-16th June 2023 (Seoul 12-13 June, Tokyo 15-16 June)

**Monday 12th June (Times in KST/JST), Conrad Hotel, Seoul**  
**Live Sessions with Korea Investors Simultaneous translation in Korean and English**

**1300 Registration & Networking**

**1400 Welcome and Opening remarks:**

**1410 Panel: Diversifying Infrastructure Investing Strategies [English]**

- Decarbonisation and digitalization – will these two strategies continue to dominate?
- How can investors best diversify risk/return through specialisation?
- Investment opportunities in the new definition of Infrastructure: hydrogen supply chain, energy efficiency, battery. Where does one draw the line with PE? Should infrastructure be redefined?

**Speakers:**

Jansen Ang, Private Infrastructure Asia, Member of Management, **Partners Group**  
Serkan Bahceci, Partner/Head of Research, **Arjun Infrastructure Partners**  
Vincent Levita, Founding Partner & CEO, **Infravia**  
Sam Lissner, Principal, **Ridgewood Capital**

**1500 Presentation**

**Speaker:** Ross Israel, Head of Global Infrastructure, **QIC**

**1530 Coffee Break**

**1600 Panel: Investing in the infrastructure of the future, the role of technology in the asset class [English]**

- What is infrastructure of the future and how do we define it?
- Is Infratech an infrastructure play or is it best to play in the PE space or debt?
- How do we assess risk/return when taking on technology risk?

### 1640 Panel: Effectively working with Korean asset managers [Korean]

- Understanding the role of the asset management firm in Korea
- How do asset managers view the global infrastructure market and where do they see the best investment opportunities?
- How can international GPs effectively work with Korean asset management companies?

#### **Moderator:**

Catherine Roh, Team head, Cross-border Infrastructure Div. Cross-border Investment Team 2, **KB Asset Management**

#### **Speakers:**

Jay Choi, Team Head, **IGIS Asset Management**

Yeon Jun Choi, Executive Director, Alternative Investment Div., **Pinestreet Asset Management**

### 1720: Welcome Cocktail Reception

## Tuesday 13th June (Times in KST/JST) Conrad Hotel, Seoul Live Sessions with Korea Investors Simultaneous translation in Korean and English

### 0830 Registration & Networking

### 0900 Opening Remarks and Keynote Presentation [English]

### 0930 Keynote Panel: Investing in Infrastructure as a recession proof strategy [English]

- Given rising interest rates and economic uncertainty how will investor returns likely evolve?
- What will infrastructure investors need to do differently to protect the strengths of this asset class?
- In an increasingly competitive market for assets, how do funds keep their competitive advantage and access the best deals?

#### **Moderator:**

Tharshini Ashokan, APAC Reporter, **Infrastructure Investor**

#### **Speakers:**

David Cooper, Head of EMEA and Australian Infrastructure Debt, **IFM Investors**

Scott Lawrence, Partner, **Glennmont Partners**

### 1020 Break



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

### **1050 Panel: The evolution of energy transition investing strategies [English]**

- How has the energy security crisis impacted on investment strategies and returns in the sector?
- Looking beyond conventional renewable assets – which areas hold the most exciting investing opportunities?
- Energy Transition as an ESG strategy

#### **Speakers:**

Stephane Ifker, Senior Partner, **Antin Infrastructure Partners**

Marcus Ayre, Head of **Igneo Infrastructure Partners, Europe**

### **1140 Presentation**

### **1210 Lunch & Networking**

### **1315 Panel: Investing in Infrastructure Debt [English]**

- How have debt funds performed in the current inflationary environment?
- Does infra debt have a comparative advantage to equity in light of the current global economic and political volatility?
- How best to configure ESG into infra debt investing – what are the challenges with the current changing regulations?

### **1400 Presentation**

### **1430 Panel: LPs views on the market [Korean]**

- Are Korean LPs increasing their allocations in the asset class? How do they view infrastructure vs other private market asset classes?
- How have rising interest rates and the energy crisis impacted on LPs strategies?
- Considerations on FX premium and hedge practice in Korea

#### **Moderator:**

Andrew Shin, Senior Investment Consultant, **Willis Towers Watson**

#### **Speakers:**

Kihyun Kim, **Hyundai Marine & Fire Insurance**

Youngshin Park, Head of RE & Infrastructure Investment, **National Federation of Fisheries Cooperatives**

### **1520 Cocktail Reception**

## **Thursday 15th June (Times in KST/JST) Shangri-La Hotel, Tokyo Live Sessions with Japanese Investors Simultaneous translation in Japanese and English**

### **0730 Korean & Japanese investor breakfast briefing**

### **0830 Registration & networking**



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### 0900 PEI Opening remarks & Keynote Presentation [Japanese]

**Speaker:** Masatoshi Akimoto, Member, **House of Representatives, Chief Secretary, Parliamentary Association for Promotion of Renewable Energies**

### 0930 Keynote Panel: Infrastructure's role in uncertain economic times [English]

- Given rising interest rates and economic uncertainty how will investor returns likely evolve?
- What will infrastructure investors need to do differently to protect the strengths of this asset class?
- In an increasingly competitive market for assets, how do funds keep their competitive advantage and access the best deals?

#### **Moderator:**

Tharshini Ashokan, APAC Reporter, **Infrastructure Investor**

#### **Speakers:**

Joost Bergsma, CEO and Managing Partner, **Glennmont Partners**

Gregory Smith, President and CEO, **Instar Asset Management**

Yasuhiro Ono, Director, **Stonepeak Infrastructure Partners**

### 1020 Break

### 1050 Panel: The evolution of energy transition strategies [English]

- How has the energy security crisis impacted on investment strategies and returns in the sector?
- Looking beyond conventional renewable assets – which areas hold the most exciting investing opportunities?
- Energy Transition as an ESG strategy

#### **Speakers:**

Stephane Ifker, Senior Partner, **Antin Infrastructure Partners**

### 1140 Presentation

**Speaker:** Ross Israel, Head of Global Infrastructure, **QIC**

### 1210 Lunch & Networking

### 1320 Panel: Diversification in the investment portfolio [English]

- Decarbonisation and digitalization – will these two strategies continue to dominate?
- How can investors best diversify risk/return through specialisation?
- Investment opportunities in the new definition of Infrastructure: hydrogen supply chain, energy efficiency, battery. Where does one draw the line with private equity?
- Should infrastructure be redefined?

#### **Speakers:**

Mark Gilligan, Head of Infrastructure, **AXA IM Alts**

Vincent Levita, Founding Partner & CEO, **Infravia**

Sam Lissner, Principal, **Ridgewood Capital**

Andrew Kwok, Managing Director, Head Private Infrastructure Asia, **Partners Group**



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#### **1410 Panel: The role of infrastructure debt in the portfolio [English]**

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- Does infra debt have a comparative advantage to equity in light of the current global economic and political volatility?
- How best to configure ESG into infra debt investing – what are the challenges with the current changing regulations?

#### **1500 Break**

#### **1530 Panel: Investing in the infrastructure of the future, the role of technology in the asset class [English]**

- What is infrastructure of the future and how do we define it?
- Is Infratech an infrastructure play or is it best to play in the PE space or debt?
- How do we assess risk/return when taking on technology risk?

#### **Speakers:**

Serkan Bahceci, Partner/Head of Research, **Arjun Infrastructure Partners**  
Niall Mills, Global Head of **Ignio Infrastructure Partners**

#### **1620 Panel: Understanding Japanese LPs appetite for the asset class [Japanese]**

- How do LPs view infrastructure in comparison to other private market asset classes? Still at the head of the pack?
- How have rising interest rates and the energy crisis impacted on LPs strategies?
- Core/Core plus & Open/Close funds – which strategies are currently seen as preferential?

#### **Moderator:**

Takako Koizumi, Executive Director, Head of Investment Management Department,  
**Mitsui & Co Alternative Investments**

#### **Speakers:**

Koji Someno, Head of Real Asset Fund Investment Division, **Dai-ichi Life Insurance**  
Yuriko Watanabe, Director, **Japan Post Bank**  
Keisuke Okano, Senior Director, Head of Investment, Private Assets, **ORIX Life Insurance Corporation**

#### **1710 Cocktail Reception**

### **Friday 16th June (Times in KST/JST) Shangri-La Hotel, Tokyo Live Sessions with Japanese Investors Simultaneous translation in Japanese and English**

#### **0830 Registration & networking**

#### **0900 PEI Opening remarks & Keynote Presentation**



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### 0930 Keynote Panel: International Investors' take on Japan's investment opportunity

- How do international GPs and investors evaluate the opportunities for investing in Japan. How much has the weakened yen catalysed interest?
- Does offshore wind and solar remain the principal interest? How easy is it to access renewable deals for foreign entities?
- Case study investment success stories

#### Moderator:

Wataru Kawabata, Managing Director, **DBJ Asset Management**

#### Speakers:

Cyril Cabanes, Managing Director, **Infrastructure, Asia Pacific, CDPQ**

Kanna Mihara, Managing Director, **Macquarie Capital**

### 1020 Break

### 1050 Panel: The next frontier of infrastructure investing in Japan [Japanese]

- The hydrogen investing opportunity in Japan – understanding the current FIT framework
- What can the government do encourage more private capital into emerging sectors?
- Digitalisation and datacentres – are these markets in danger of becoming overheated in Japan?

### 1140 Panel: Working with Japanese gatekeepers [Japanese]

- How have current macro-economic headwinds affected fund selection? A priority still for core?
- How do gatekeepers view ESG and sustainability themes when selecting a GP?
- The blurring definition of infrastructure - is this a concern for gatekeepers?

#### Moderator:

Atsunori Yamaura, Director, **Russell Investments**

#### Speakers:

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

Hiroshi Matsui, **Sumitomo Mitsui Trust Bank**

### 1220 Lunch & Networking

### 1310 Close of Conference



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