

# Infrastructure Investor Japan Korea Week Keynote Speakers

Takako Onitsuka, Director, Environmental Finance Office, Ministry of Economy, Trade and Industry,  
Japan (METI)

Mari Tanaka, Director - Research and Data Analytics, Private Markets, GPIF

Dong Ik Lee, Former Director General, Investment Operations Department, Asian Infrastructure  
Investment Bank (AIIB)

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

# Infrastructure Investor Network Seoul Forum

Tuesday, 2<sup>nd</sup> June, Conrad Hotel, Seoul (Times in KST/JST)

Live Sessions with Korea Investors Simultaneous translation in Korean and English

0800-0900 Investor's breakfast briefing (collocated with PERE Seoul)

0830 Registration & Networking

0905 PEI & Chair Opening Remarks

Speaker: John Walker AM, Chairman, Eastpoint Partners

0910 Keynote Panel: Infrastructure investing opportunities in a deglobalized world [English]

- Which markets stand to benefit from reshoring (Europe/Asia?)— and which are structurally disadvantaged?
- How should investors rethink geographic and regulatory risk?
- Will digitalisation and decarbonisation themes continue to dominate? What emerging trends should investors be aware of?

Moderator: Tom Taylor, Reporter, Infrastructure Investor

Speakers: Jun Park, Managing Partner, Brookfield

Speaker, Eurazeo

James Choi, Senior Adviser, Prostar Capital

Chenhua Shen, Partner, I Squared

Zoe Jeanroy-Broz, Investment Director & Partner, Vauban Infrastructure Partners

1000 Keynote Interview [English]

Dong Ik Lee, CEO, D&L Partners interviewed by Tom Taylor, Reporter, Infrastructure Investor

1030 Break

1100 Panel: Powering the infrastructure of the future [English]

- Modernizing electricity networks: How are investors strengthening and upgrading transmission and distribution systems to ensure long-term reliability?
- The energy behind AI: What investment strategies are emerging to support the massive power requirements of global data centre expansion?
- Balancing the power mix: How will renewables, nuclear, grid upgrades, and storage solutions collectively shape the next generation of energy infrastructure?

Moderator: Ayaka Fujiwara, Climate Investment Specialist, Green Climate Fund

Speakers: Kok-Leong Toh, Senior Director, Infrastructure, La Caisse

Francesco Cacciabue, Global Head of Clean Energy Investments, Nuveen Infrastructure

Deb Hajara, Managing Director, Co-Head APAC Infrastructure, Ontario Teachers' Pension Plan

Ryan Chua, Senior Managing Director, Stonepeak

1150 Presentation [Korean]

Speaker: Youngtak Hong, Director, Policy Fund Division (PIS Fund), Korea Overseas Infrastructure & Urban Development Corporation (KIND)

1205 Lunch & Networking



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

### 1310 Panel: The Shift toward Core-Plus: Rethinking risk, value creation, and stability

- What is driving the push up the risk curve?
  - How can investors still achieve double-digit returns without taking value-add risk?
  - Is core-plus about risk, return, or both?

Moderator: Catherine Hyeyun Roh, Yonsei University

Speakers: Serkan Bahceci Partner & Head of Research, Arjun Infrastructure Partners

John Hanna, Managing Partner, Basalt Infrastructure Partners

Alistair Ray, CIO, Dalmore Capital

Carl Elia, Vice President & Director, Global Infrastructure Investments, TD Asset Management

### 1400 Presentation [English]

Ethan Koh, Head of Global Research Operations, PEI Group

### 1420 Panel: Infrastructure debt in the era of private credit ascendance [English] □

What role will infrastructure debt play in private credit's growth story?

- What does this mean for infra equity? Will AUM for debt begin to exceed equity?
- The fallout from the asset-backed lending phenomenon that is expediting private credit's growth

Moderator: Andrew Shin, Head of Korea, Institutional Distribution – Asia Pacific ex-Japan, Cohen & Steers

Speakers: Amanda Tonggard, Partner, AIP Management

Alex Bebov, Managing Director, BAC

Ben Hwangbo, Director, Hanwha Asset Management

Seungki Jeong, Head of Team, Kiwoom Asset Management

### 1510 Break

The following sessions are jointly run with the PERE Seoul Forum

### 1540 Panel: Spotlight on investing in data centres

- Where do GPs see data centres as sitting on the risk-return spectrum within real assets?
- How are investors assessing the market overall? Is the AI trend continuing to a boom that is translating to investment on the ground?
- What solutions are GPs coming up with to get around the issues over power and grid connectivity?

Moderator: Elizabeth Oh, Managing Director, Thrive Alternatives Capital Advisory

Speakers: Michael Turner, Managing Director, Investments, CIM

Kai Goh, Co-Founder and Chief Executive Officer, Digital Halo

Jungik Cho, Managing Director, KB Securities

Sunkyo Jeong, Team Head, Global Alternative Investment, Korea Investment & Securities

### 1620 Real Assets LP Panel: Navigating new horizons: Korean LPs expanding role in global real assets [Korean]

- Which real asset themes—energy transition, data/compute infrastructure, transportation, logistics—are Korean LPs most focused on?
- How are LPs incorporating geopolitical risk, currency exposure, and valuation discipline into underwriting and pacing decisions?
- Fund manager selection, have priorities changed for investors in the past year?

Moderator: Dong Hun Jang, Former CIO, POBA

Speakers: Seunghwan Ro, Investment Director, NH Securities

Harry Song, Head of US & Europe Real Estate, POBA  
Aaron Dong, Head of IACIF Alternative Investment, Samsung Asset Management  
Jin Hwan Kim, Head of Real Estate and Infrastructure Investment Team, TP Pension

1705 Joint Cocktail Reception with the PERE Seoul Forum



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