

**Infrastructure Investor Tokyo Forum**

**Thursday 13 June (Times in KST/JST)**

Live Sessions with Japanese Investors Simultaneous translation in Japanese and English

**0830 Registration & networking**

**0900 PEI Opening remarks**

**0910 Keynote Presentation: Infrastructure and Japan's foreign investment regime**

Ryusuke Bushimata, Director, International Bureau, **Ministry of Finance Japan**

**0930 Keynote Panel: Infrastructure investing at maturation: Will it remain a resilient asset class?**

- How will the interest rate environment and continuing geopolitical uncertainty shape GPs' investment strategies going forward?
- Will the impact of digitalisation and decarbonisation continue to drive investment opportunities in the asset class?
- 2023 was a challenging year for fundraising – are GPs seeing stronger interest in 2024?

Moderator: Daniel Kemp, APAC Editor, **Infrastructure Investor**

Niall Mills, Global Head, **Igneo Infrastructure Partners**

Achal Bhuwania, Chief Investment Officer, **Equitix**

Tara Davies, Co-Head of KKR EMEA and Co-Head of European Infrastructure, **KKR**

Rob Kupchak, Senior Managing Director, **Stonepeak**

Mounir Corm, Deputy CEO & Founding Partner, **Vauban Infrastructure Partners**

**1020 Break**

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



**1050 Panel: Seizing on the growth opportunities in the energy transition**

- How do you find value in growth technologies such as hydrogen and carbon capture?
- What are untapped or niche areas of the energy transition to look at with the most growth potential?
- How should LPs view supply chain and regulatory challenges when making

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

Speakers: Peter Schümers, Partner & Co-Head Investment, **Energy Infrastructure Partners**

Neil Doherty, Executive Director, **IFM Investors**

Maximilian Lindner, Partner, **Antin Infrastructure Partners**

Don Dimitrievich, Portfolio Manager, Senior Managing Director, Energy Infrastructure Credit, **Nuveen**

Isabella Pacheco, Director, Climate Infrastructure Group, **Blackrock**

**1140 Presentation**

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

**1200 Lunch & Networking**

<b>Stream A: Sustainability &amp; the energy transition</b>	<b>Stream B: Infrastructure strategies &amp; sectors</b>
<p><b>1310 Panel: The rise and rise of infrastructure secondaries</b></p> <ul style="list-style-type: none"> <li>- What are the key market drivers spurring on the growth of infrastructure secondaries?</li> <li>- Understanding the pricing dynamics of the current secondaries market</li> <li>- How can secondaries investing benefit Japanese LPs as a means of J-curve mitigation?</li> </ul> <p>Moderator: Jingjing Bai, Senior Advisor, <b>bfinance</b>  Speakers: Speaker, <b>Ares Management</b>  Joji Takeuchi, Chief, Private Asset Investments, <b>Asset Management One</b>  Alistair Ray, Partner, CIO, <b>Dalmore Capital</b>  Shigefumi Kuroki, Executive Officer,</p>	<p><b>1310 Panel: Specialise or diversify? What are the optimal investing strategies for Japanese LPs in the current environment?</b></p> <ul style="list-style-type: none"> <li>-How has the macroeconomic climate impacted on asset allocations?</li> <li>-What are the correlations and synergies between investing in GX and DX?</li> <li>-What are the main drivers behind the increasing number and size of sector specific funds in the market?</li> </ul> <p>Moderator: Hiroto Asakawa, Chief Senior Consultant, <b>Sumitomo Mitsui Research</b>  Speakers: Serkan Bahceci, Partner/Head of Research, <b>Arjun Infrastructure Partners</b>  Omar Jaffrey, Founder &amp; Managing Partner, <b>Palistar Capital</b>  Jamie Storrow, Managing Director &amp;</p>

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<p><b>DBJ Asset Management</b> Toru Masuda, Executive Officer, Alternative Investment, <b>Sumitomo Mitsui Trust Bank</b></p>	<p>Head of Infrastructure, <b>Northleaf Capital Partners</b> Joost Bergsma, Chief Executive Officer and Managing Partner, <b>Nuveen</b></p>
<p><b>1400 Panel: Investing in infrastructure through an ESG lens</b></p> <ul style="list-style-type: none"> <li>- The case for ESG: why it should be at the forefront of Japanese LPs' investing decisions in the asset class</li> <li>-The role of data in ESG investing: are we moving towards greater standardisation?</li> </ul> <p>Moderator: Takaaki Hoshino, Executive Officer, Head of Global Fund Investment, <b>DBJ Asset Management</b> Philip Kent, Director, <b>Gravis</b> Wakako Taniguchi, Executive Consultant, <b>Russell Investments</b> Jean-Pascal Asseman, Head of Infrastructure &amp; Partner, <b>AXA IM Prime</b> Chengchen Qian, Senior Project Manager, Sustainable Infrastructure, <b>Global Infrastructure Basel Foundation</b></p>	<p><b>1400 Panel: Spotlight on the Australian market</b></p> <ul style="list-style-type: none"> <li>-Are there still major privatisation investing opportunities in the pipeline?</li> <li>- Investing in Australian mid-market renewables</li> <li>- Successful case studies where ESG integration has created long-term value for infrastructure assets</li> <li>- Understanding the current local regulatory environment – help or hindrance?</li> </ul> <p>Moderator: Tom Taylor, Reporter, <b>Infrastructure Investor</b> <b>Michael Bessell</b>, Executive General Manager, Infrastructure, <b>Dexus</b> Danny Latham, Partner, <b>Igneo Infrastructure Partners</b> Kirsten Whitehead, Partner, Portfolio Management – Infrastructure, <b>QIC</b></p>
<p><b>1440 Panel: Equity vs Debt – which is the better strategy in the current market?</b></p> <ul style="list-style-type: none"> <li>- How have infrastructure debt GPs performed in the current interest rate environment?</li> <li>- Does infra debt have a comparative advantage to equity in light of the current global economy?</li> <li>- Which types of deals will be attractive for infrastructure debt in the near-to-mid-term?</li> </ul> <p>Moderator: Sayaka Iwase, Director, <b>Five Arrows Managers S.A</b></p> <p>Claus Fintzen, CIO, Infrastructure Debt, <b>Allianz Global Investors</b> Speaker, <b>Ares Management</b></p>	<p><b>1440 Presentation: Spotlight on renewable assets</b></p> <p>Speaker: Yngve Slyngstad. CEO, <b>Industry Capital Partners.</b></p> <p><b>1500 Presentation: Infrastructure Case Study</b></p>

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Jorge Camina, Partner & Head of Sustainable Infrastructure Credit, <b>Denham Capital</b>	
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### 1520 Break

### 1550 Presentation: Finding value in European mid-market infrastructure

### 1620 Panel: Japanese LPs – still bullish for increasing infrastructure allocations?

- As Japanese LPs now have some track record in the asset class – how do they evaluate their commitments so far?
- How has the depreciating yen impacted on LPs' investment strategies?
- What are the lessons learnt so far from their investments? Would they have made any changes in retrospect?

Moderator: Takako Koizumi, CIO, **Mitsui & Co Alternative Investments**

Speakers: Koji Someno, Head of Real Asset Fund Investment Div. Alternative Investment Dept. **Dai-ichi Life Insurance**

Tomoya Hori, Director, **Japan Post Bank**

Miho Hosoya, Senior Consultant, **Mercer**

Tuck Furuya, CEO, **Ark Totan Alternative Co., Ltd.**

### 1720 Cocktail Reception

## Friday 14 June (Times in KST/JST)

Live Sessions with Japanese Investors Simultaneous translation in Japanese and English

### 0830 II Membership breakfast briefing

**Speaker:** Andrew Rodriguez, Senior Research Associate, **PEI**

### 0900 Registration & networking

### 0930 PEI Opening remarks

### 0935 Keynote Presentation

**Speaker:** Kikuko Emae, Senior Director and Head of Infrastructure, **Government Pension Investment**

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**Fund (GPIF)**

**0955 Keynote Panel: Accelerating Japanese institutional capital into infrastructure and alternatives**

- What structural and regulatory changes need to be made to help accelerate LPs investments into infrastructure and private markets? Is the gatekeeper model fit for purpose?

- Which Japanese LPs have found the most success from allocating to infrastructure?

What made them stand out?

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- Corporate pension funds are still lagging; how do we enable them to invest more in private markets and infrastructure?

Moderator: Hidekazu Ishida, Special Advisor, **FinCity.Tokyo**

Speakers: Yasuhiko Hama, General Manager, Infrastructure Investment Group, Real Asset Investment Department, **Tokio Marine Asset Management**

Hideto Minegishi, Corporate Officer, General Manager, **Sumitomo Mitsui Trust Bank**

Tadasu Matsuo, Managing Director, Head of Global Alternative Investments, **Japan Science & Technology Agency (JST)**

**1040 Break**

**1110 Panel: Japan's domestic infrastructure investing challenge – where is the deal flow?**

- Recent offshore wind auctions - what are the lessons learnt? How do we overcome the structural barriers to investing in the sector?

- Battery storage and the growing demand for grid-scale batteries – where are the investing opportunities for private capital?

- Are there opportunities in investing in niche domestic infrastructure assets that may have been overlooked?

Moderator: Dan Shulman, CEO, **Shulman Advisory**

Speakers: Jose Antonio Millan Ruano, CEO, **Nozomi Energy K.K**

Toshiaki Isoi, CEO, **Yotsuya Capital**

Kenjiro Okamura, CEO, **Japan Extensive Infrastructure**

Oliver Senter, Executive Officer, Investment & Finance Dept, **Shizen Energy**

**1200 Panel: Moving up the risk curve – the case for investing in core plus and value add**

- As competition has increased for core-plus infrastructure assets, are returns still as attractive as in previous years? Are deals harder to access?

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**Infrastructure  
Investor  
Network**

## **Tokyo Forum**

- What are the relative merits of investing in higher-risk assets as opposed to core infrastructure in the current economic environment?
- Which subsectors and geographies have the strongest growth potential?

Moderator: Alexander Wellsted, Principal Evaluation Specialist, **ADB**

Speakers: Dr. Mathias Bimberg, Managing Director, Head of Infrastructure, **Prime Capital AG**

Sam Lissner, Principal, **Ridgewood Capital**

Nick Riordan, Infrastructure Specialist, CBRE Investment Management

Speaker, **ICG Asset Management**

Harsh Agrawal, Senior Partner, **I Squared Capital**

**1250 Lunch & Networking**

**1350 Close of Conference**

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