

Seoul Forum

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Monday 29 September | Conrad Hotel, Seoul (Times in KST/JST)

Live sessions with simultaneous translation in Korean and English

08:30 | Registration & Networking

09:05 | PEI & Chair Opening Remarks

09:20 | Keynote Presentation

Speaker:

Dr. Sam Y. Chung, Investment Policy Committee Member, **National Pension Service (NPS)**

09:40 | Keynote Panel: Infrastructure Investing in a Volatile World: Balancing Opportunities and Geopolitical Risks

- In an increasingly unstable geopolitical landscape, how will infrastructure as an asset class fare compared to other private markets in 2025?

- Will ongoing geopolitical risks and volatility have tangible impacts on the renewables sector and its appeal as a subsector?
- Amid increasing concerns about overpaying for assets, how do GPs ensure they source the best deals?

Moderator: **Dong Hung Jang**, Senior Advisor, **Yulchon**

Speakers:

Jun Park, Managing Partner, Infrastructure, **Brookfield**

Michael Chan, Managing Director, **Stonepeak**

Christoph Bruguier, CIO, Partner, **Vauban Infrastructure Partners**

10:30 | **Break**

11:00 | **Panel: Renewables Platforms as an Investment Strategy**

- Europe vs. U.S. vs. APAC – which global jurisdictions are proving the most attractive?
- How can investing in renewables platforms mitigate risk, diversify portfolios, and enhance scalability?
- Distributed energy vs. large-scale renewables: understanding the benefits and limitations of distributed energy systems versus large-scale renewable projects.

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

Speakers:

Srini Viswanathan, CEO & Founder, **AltEons Energy**

Eddie Choi, **Macquarie Asset Management**

Shamik Chatterjee, Head of Investments, (Asia) **Octopus Energy Generation**

Seungsoo Han, Country Manager, Korea, **TerraWind Renewables**

11:50 | **Presentation**

Speaker:

Dominic Helmsley, Head of Economic Infrastructure, **Aberdeen Investments**

12:10 | **Lunch & Networking**

13:10 | **Panel: The Rise of Digital Infrastructure and AI**

- How can digital infrastructure investments be optimized to support the real-time data needs of AI, including advancements in data centers, high-speed networks, and edge computing?
- What are the key investment opportunities for institutional investors in AI-driven infrastructure, such as smart cities, 5G networks, and energy management systems?
- What strategies can investors use to balance regulatory, technological, and cybersecurity risks while maximizing returns in this rapidly evolving sector?

<p>Speakers:</p> <p>Chuan Wei Lim, Managing Partner, Analysys Mason</p> <p>Sangsu Park, Executive Director, Infrastructure Group, Mastern Investment Management</p> <p>Ivan Chern, Managing Partner, Seraya Partners</p>
<p>14:00 LP Spotlight Interview</p> <p>Interviewee:</p> <p>John Chang, Managing Director, Real Assets Group, CPPIB,</p> <p>Interviewer:</p> <p>Daniel Kemp, APAC, Editor, PEI</p>
<p>14:20 Panel: Harnessing Investment Opportunities in the Mid-Market Sector</p> <ul style="list-style-type: none"> • Why does the mid-market provide more favourable exit dynamics and faster capital velocity compared to large-cap investments? • Mid-market specialists vs. multi-strategy platforms – which investment strategies are the most compelling? • Is there a risk that generalists in the mid-market could get squeezed out? <p>Moderator: Andrew Shin, Head of Korea, Cohen & Steers</p> <p>Speakers:</p> <p>Serkan Bahceci, Partner & Head of Research, Arjun Infrastructure Partners</p> <p>Mel Pyzik, Managing Director, Head of APAC, Institutional Client Group, CIM</p> <p>Siôn Jones, Chief Operating Officer (Asset Management), Equitix</p> <p>Patrick Freer, Managing Director, Head of Value, Creation & Asset Management, Fengate Asset Management</p>
15:10 Break
<p>1540 Panel: Unlocking value: The evolving landscape of infrastructure secondaries investment</p> <ul style="list-style-type: none"> • How does investing in secondaries compare to primary infrastructure investments in terms of returns? • How are the nature of deals in the secondary infrastructure market evolving? • How are investors navigating liquidity, portfolio diversification, and the increasing demand for secondary market transactions in private infrastructure deals? <p>Moderator: Diego López, Founder & Managing Director, Global SWF</p> <p>Speakers:</p> <p>Faraz Shakil Qureshi, Head of Infrastructure Secondaries, AXA IM Prime</p>

<p>Aiva Sperberga, Partner, Campbell Lutyens</p> <p>Benjamin Wu, Principal, Infrastructure & Real Assets, HarbourVest Partners</p>
<p>16:20 Panel: Navigating new horizons: Korean LPs expanding role in global infrastructure investment</p> <ul style="list-style-type: none"> • What are the current key criteria for Korean LPs when selecting GPs and have they changed in the past 12 months? • Which sectors are Korean investors bullish on? Are they increasing their digital infrastructure allocation? • Do blind pool funds remain the default or are we seeing more appetite for co-investments and direct investing? <p>Moderator: Monica Bae, Director, AIGCC</p> <p>Speakers:</p> <p>Youngshin Park, Head of Alternative Investment Department, National Federation of Fisheries Cooperatives</p> <p>David Lee, Head of Alternative Investment Management Department, Korea Investment & Securities</p>
<p>17:00 Closing R&A Presentation</p> <p>Speaker:</p> <ul style="list-style-type: none"> • Ethan Koh, Global Head of Research Operations, PEI Group
<p>17:15 Joint Cocktail Reception with PERE Seoul</p>