

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, Managing Director, **Macquarie Asset Management**

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

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

11:50 | **Presentation: Unlocking Sustainable Value - The Role of Infrastructure Small-Caps in Energy Transition**

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?

Moderator: **Daniel Kemp**, APAC, Editor, **PEI**

Speakers:

Chuan Wei Lim, Managing Partner, **Analysys Mason**

Sangsu Park, Executive Director, Infrastructure Group, **Mastern Investment Management**

Ivan Chern, Managing Partner, **Seraya Partners**

14:00 | **LP Spotlight Interview**

Interviewee:

John Chang, Managing Director, Real Assets Group, **CPPIB**,

Interviewer:

Daniel Kemp, APAC, Editor, **PEI**

14:20 | **Panel: Harnessing Investment Opportunities in the Mid-Market Sector**

- 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?

Moderator: **Kallan Resnick**, Partner, **Park Hill Group**

Speakers:

Serkan Bahceci, Partner & Head of Research, **Arjun Infrastructure Partners**

Mel Pyzik, Managing Director, Head of APAC, Institutional Client Group, **CIM**

Siôn Jones, Chief Operating Officer (Asset Management), **Equitix**

Patrick Freer, Managing Director, Head of Value, Creation & Asset Management, **Fengate Asset Management**

15:10 | **Break**

1540 | **Panel: Unlocking value: The evolving landscape of infrastructure secondaries investment**

- 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?

Moderator: **Diego López**, Founder & Managing Director, **Global SWF**

Speakers:

Faraz Shakil Qureshi, Head of Infrastructure Secondaries, **AXA IM Prime**

Aiva Sperberga, Partner, **Campbell Lutyens**

Benjamin Wu, Principal, Infrastructure & Real Assets, **HarbourVest Partners**

16:20 | **Panel: Navigating new horizons: Korean LPs expanding role in global infrastructure investment**

- 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?

Moderator: **Andrew Shin**, Head of Korea, **Cohen & Steers**

Speakers:

David Lee, Head of Alternative Investment Management Department, **Korea Investment & Securities**

Donghyup Ha, Senior Manager, **National Agricultural Cooperative Federation**
Jayho Jang, **Shinhan Asset Management**

17:00 | **Closing R&A Presentation**

Speaker:

- **Ethan Koh**, Global Head of Research Operations, **PEI Group**

17:15 | **Joint Cocktail Reception with PERE Seoul**