

Infrastructure Investor Network Seoul Forum

Tuesday, 2nd 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**

Laurent Chatelin, Managing Partner - Co-Head Infrastructure, **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 & Head of 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

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

- What is driving the push up the risk curve?

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



- 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 Tongsgard, Partner, **AIP Management**

Alex Bebov, Managing Director, **BAC**

Jeongwoong Joseph Lee, Head, Global Alternative Investment Team, **Hyundai Investments**

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 [Korean/English]

- 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 Group**

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 Investment & 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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