

Infrastructure
Investor

Japan Korea Week Seoul Summit 2020

8 September
Virtual from Seoul

Infrastructure Investor Seoul Summit
Conference: 8 September | Networking available 7-11 September

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PEI

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For sponsorship opportunities:
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Monday 7th September, Online Networking Opens

Tuesday 8th September

0850 **PEI welcome and chairman's opening remarks**

0900 **Keynote presentation**

Speaker: John Breckenridge, Senior Managing Director, Head of Energy Infrastructure, Capital Dynamics

0930 **Keynote Panel: Infrastructure investing 2020: Navigating the next decade's investment landscape**

- Given the rising competition for deals, how is this affecting the current investment landscape and GPs strategies?
- Where are the best current sectors and geographies for Korean investors to deploy capital?
- The rise of regulatory risk and populism – how much of an impact and risk does it pose in the current climate?

Moderator: Mark Weisdorf, Managing Partner, Mark Weisdorf Associates

Speakers: Cyril Cabanes, Managing Director, Infrastructure, Asia Pacific, CDPQ
Brad Kim, Managing Director, Stonepeak Infrastructure Partners

1020 **Presentation**

Speaker: Antin Infrastructure Partners

1050 **Networking Coffee Break**

1120 **Presentation**

Speaker: Charles Dupont, Head of Infrastructure Finance, Schroders

1140 **Presentation**

Speaker: Francesco Cacciabue, Partner and Chief Financial Officer, Glenmont Partners

1200 **Presentation**

Speaker: Helge Rau, Head of M&A, wpd AG

1220 **Break**

1340 **Presentation: UK Regulated assets – changes and prospects**

Speaker: Sion Jones, Chief Operating Officer, Equitix



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1400 **Panel: Korean Infrastructure professional's perspectives on the asset class**

- What are the key infrastructure trends and changes in capital flows viewed by Korean professionals?
- Understanding the role of Korean asset managers in the market
- Preferences for Inbound vs Outbound sectors – does the former remain a niche strategy play?

Speakers:

Donghi Park, Division Head of Energy & Infrastructure, Kiwoom Asset Management
Seong Oh Yeom, Managing Director, Korea Ratings

1440 **Break**

1500 **Keynote LP Interview**

Speaker: Janghwan Lee, Managing Director, Financial Investment Group Head, LOTTE Insurance

1530 **Panel: Selecting the best Infrastructure Debt strategies for Korean insurance firms**

- Which subsectors within the asset class are more attractive at the moment?
- Does appetite remain high amongst Korean investors? What drives their investment?
- Which are the main risks that investors need to keep in mind when investing in this asset class?

Speakers: Scott Lawrence, Partner, Glennmont Partners

Junho Choi, Senior Portfolio Manager, KDB Life

1615 **Panel: Accelerating the energy transition**

- Can you still get good returns in developed markets given the recent erosion of subsidies? How to find these returns?
- What is the role that corporate PPAs can play in the current environment?
- Investing in emerging renewables markets – which geographies and sectors are of key interest?

Moderator: Tony Clamp, Director, Private Sector Facility, Green Climate Fund

Speakers:

Andrew Kwok, Managing Director, Head of Private Infrastructure Asia, Partners Group
Eugene Zhuchenko, Director and Founder, ETORE Advisory
Moonkyung Kim, Managing Director, Peony Investments

1700 **Panel: Korean LPs current take on the market**

- How much of a concern is the amount of dry powder we have in the market to LPs?
- How do Korean LPs evaluate and rate their infrastructure GP relationships so far?
- How important are ESG factors when choosing a GP?

Moderator: Andrew Shin, Director & Head of Investment Services, Willis Towers Watson

Speakers: Jinho Lee, Head of Global Real Assets, Postal Savings, Korea Post



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Seok Won Lee, Investment Manager, POBA

Jason Hyunjae Kim, Head of Infrastructure PF Team , Samsung Fire & Marine Insurance

1745 **Close of conference**

Friday 11th September, Online Networking Closes



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