2025 Agenda

Wednesday 4 June 2025

08:30 – 09:00
Registration and networking

09:00 – 09:30
Keynote presentation

09:30 – 10:20
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 over-paying for assets, how do GPs ensure they source the best deals?

10:20 – 10:50
Networking break

10:50 – 11:40
Panel: Renewables Platforms as an Investment Strategy
- Europe vs US 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

11:40 – 12:00
Presentation

12:00 – 13:10
Lunch and networking

Stream A	Stream B
13:10 – 14:00 **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? **Moderated by:** Will Fee, Researcher/Journalist, **Yuri Group**	13:10 – 14:00 **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 is the nature of deals in the secondary infrastructure market evolving? • How are investors navigating liquidity, portfolio diversification, and the growing demand for secondary market transactions in private infrastructure deals?
14:00 – 14:50 **Panel: Spotlight on the US infrastructure market** • In what sectors are decarbonization efforts increasing investment opportunities? • How will the new U.S. administration impact the investment climate, and what regulatory changes should investors be aware of? • Does the second Trump administration make renewables investment in the US harder?	14:00 – 14:50 **Panel: Investing in infrastructure debt: a sector for all cycles** • How does infrastructure debt offer resilience across economic cycles, and what characteristics make it an attractive option in the current period of geopolitical uncertainty? • Understanding the case for sub-investment grade strategies • Does appetite for infrastructure debt remain strong in a falling interest rate environment?
14:50 – 15:30 **Panel: Driving sustainable strategies in infrastructure investing** • Aligning sustainability with profitability, how can infrastructure investors balance the need for fair pricing with ambitious net zero goals? • How should infrastructure funds address physical and transition risks in their portfolios while seizing opportunities in renewables? • What's the most effective way for infrastructure investors to engage with portfolio companies' sustainability projects? Philip Kent, CEO, **Gravis** **Moderated by:** Monica Bae, Director, **AIGCC**	14:50 – 15:30 **Panel: Investing in global vs regional infrastructure funds** • How do global infrastructure funds compare to regional ones in terms of diversification and risk management? • What are the potential return differences between investing in global versus regional infrastructure funds? • In what ways do regional funds offer unique opportunities for infrastructure investment that may be less accessible to global funds? Eg. accessing Asian investment opportunities. Serkan Bahceci, Partner & Head of Research, **Arjun Infrastructure Partners**

15:30 – 16:00
Networking break

16:00 – 16:30
Presentation

16:30 – 17:30
Panel: The maturation of Japanese LPs' investment strategies

- As Japanese investment has grown, are we seeing greater sophistication in their investment strategies? Are closed-end funds gaining traction compared to the historically popular open-end funds?
- Are more Japanese LPs investing directly without gatekeepers, and will the role of gatekeepers remain central moving forward?
- How do Japanese investors view current geopolitical risks when making allocations?

Kenichiro Matsunaga, Director, Infrastructure Investment, **Japan Post Bank**
Tadasu Matsuo, Head of Alternatives, **JST**
Yasuaki Tojo, Vice President, **Development Bank of Japan**
Junichi Yonezawa, Head of Alternative Investments, **Norinchukin Zenkyoren Asset Management**
Moderated by: Takako Koizumi, Chief Investment Officer, Investment Management, **Mitsui & Co. Alternative Investments**

17:30
Cocktail Reception

Thursday 5 June 2025

08:30 – 08:50
Infrastructure Investor membership breakfast briefing

09:00 – 09:30
Registration and networking

09:30 – 09:55
Keynote presentation

09:55 – 10:40
Panel: Understanding the role of the strategic investor in the infrastructure market

- How are strategic investors approaching investments in datacentres and renewables?
- What lessons have strategic investors learned from past investments in Japan's infrastructure, and how have these experiences shaped their current strategies?
- What roles do partnerships and collaborations play in the investment strategies of strategic investors within Japan's infrastructure sector and beyond?

Moderated by: Yasuhiko Hama, Managing Director, **Crosspoint Advisors**

10:40 – 11:10
Networking break

11:10 – 12:00
Panel: The continuing evolution of the Japanese infrastructure market

- What are the primary drivers behind the increasing demand for corporate PPAs in Japan, and how is this impacting the renewable energy market?
- Evaluating the outcomes of the second-round battery auction: does it bode well for future growth?
- How will government mandates shape the financial outlook for battery and energy storage companies in Japan?

Oliver Senter, **Shizen Energy**
Moderated by: Dan Shulman, Principal, **Shulman Advisory**

12:00 – 12:50
Panel: Harnessing investment opportunities in the mid-market sector

- Why does the mid-market provide more favorable 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?

Achal Bhuwania, CIO, **Equitix**

12:50 – 13:50
Lunch and networking

13:50 – 14:00
Close of conference

14:00
Women in Real Assets networking function (Collocated with PERE Tokyo Forum)