

# H1 2018 Editorial Calendar

## January

### The road ahead

What can institutional investors and their advisers expect for infrastructure investing in the year ahead? A look at the issues and themes that could impact the market and drive opportunity.

### The midstream cycle

Despite oil and gas prices collapsing in 2014 and 2015, capacity in the United States remains at record levels and with the economy, and prices on the rise again, new drilling is ramping up. An update on the market for institutional investors in U.S. midstream energy.

**Ad reservations due:** November 28

**Ad materials due:** December 5

## February

### Emerging markets — Mexico, Central and South America

Infrastructure investment in emerging markets can offer outsized returns if the risks are understood and investments are structured accordingly. What are the opportunities and risks for institutional investors in Mexico, Central and South America?

### The value in the middle

Competition for big-ticket infrastructure investments such as Heathrow Airport or the Tappan Zee Bridge is strong, and many investors have moved on to smaller deals to capture value and get capital invested. But does the market still offer value and can investors get what they are looking for?

**Ad reservations due:** December 27

**Ad materials due:** January 3

## March

### Riding the risk curve

Investors have a range of options when selecting infrastructure investments from core to opportunistic. What defines the different risk-return opportunities,



and are some investments and assets better suited for one or the other? Can a greenfield project that starts as an opportunistic development be held until it becomes a core investment?

### Security play

Since the modern advent of private capital in infrastructure, listed infrastructure has been a leader in giving investors access to this market. What role do securities play in investors' portfolios?

**Ad reservations due:** January 26

**Ad materials due:** February 2

## April

### Catching the momentum

Private capital in infrastructure investing in the United States has been steadily increasing, but the past two years have been a renaissance of sorts. Several recent high-profile P3 deals and a focus on federal-level infrastructure policy have many anticipating more investment in the coming years.

**Ad reservations due:** February 26

**Ad materials due:** March 5

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## Being direct

Internal teams set up to make direct investments, investor clubs and co-investments — these are the tools investors are using to gain more control over investment decision-making and costs. Have expectations been met? What are the benefits and challenges, and would investors do it again?

**Ad reservations due:** February 27

**Ad materials due:** March 5

## May

### Vintage funds

The years 2005–2007 saw a spike in closed-end infrastructure funds, and these have reached or are approaching the end of their life cycles. What have been the experiences of these funds? Have they delivered as promised?

### Success benchmarked

Before investors commit capital to an investment, they want to be able to gauge the expected performance. But until recently, infrastructure as an asset class has had relatively few publicly available unlisted benchmarks to

help determine expected performance. What are the unlisted and listed benchmarks available and how have they affected the market?

**Ad reservations due:** March 28

**Ad materials due:** April 4

## June

### Investing in Europe and the U.K.

What is the mood in U.K. and European infrastructure markets? Is capital flowing into investments, or is uncertainty over political direction and policy raising concerns? New risks often bring new opportunities — can investors take advantage?

### Infrastructure debt

In the wake of the GFC, infrastructure debt funds stepped in to fill a finance void left by banks whose lending was curtailed by new regulations. How has the market for infrastructure debt funds developed and what are the challenges and opportunities for investors?

**Ad reservations due:** April 27

**Ad materials due:** May 4

*Note: Publication content is subject to change without notice. The editorial calendar for the second half of 2018 will be available in March.*

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**Geoffrey Dohrmann, Publisher & Editor-in-Chief; [g.dohrmann@irei.com](mailto:g.dohrmann@irei.com)**

For editorial inquiries, contact:

**Drew Campbell, Senior Editor; [d.campbell@irei.com](mailto:d.campbell@irei.com)**

For advertising inquiries, contact:

**Cynthia Kudren, Senior Account Executive; [c.kudren@irei.com](mailto:c.kudren@irei.com)**

For sponsorship inquiries, contact:

**Chase McWhorter, Managing Director, Infrastructure; [c.mcwhorter@irei.com](mailto:c.mcwhorter@irei.com)**

For partnership inquiries, contact:

**Jonathan Schein, SVP & Managing Director of Business Development; [j.schein@irei.com](mailto:j.schein@irei.com)**

**Institutional Real Estate, Inc.**

2274 Camino Ramon, San Ramon, Calif., 94583 USA  
Tel: +1 925-244-0500 • Fax: +1 925-244-0520 • [www.irei.com](http://www.irei.com)

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