

## 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 midstream energy in the United States.

**Ad reservations due:** November 28, 2017

**Ad materials due:** December 5, 2017

### 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 is the market still a 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 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. But today, it is the unlisted market that gets most of the attention. How did listed infrastructure evolve from its beginnings to today's offerings?

**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

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on federal-level infrastructure policy have many anticipating more investment in the coming years.

**Ad reservations due:** January 26

**Ad materials due:** February 2

## 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 has been the experience 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 and a depressed global economy. How has the market for

infrastructure debt funds developed and what are the challenges and opportunities for investors?

**Ad reservations due:** April 24

**Ad materials due:** May 8

## July/August

### The view from Toronto

Investors, managers and consultants traveled to Toronto in June for the annual VIP Infrastructure (formerly i3) conference. A summary of the event, including reviews of panel sessions, keynote speakers, quotes, figures and more.

### Time is money

In a low-return environment such as today's, eking out every bit of value from an investment becomes increasingly important. Infrastructure assets don't manage and run themselves, and fund teams with the ability to operate them most efficiently can gain an edge.

**Ad reservations due:** May 24

**Ad materials due:** June 7

## September

### Change and more change

A new administration in Washington, D.C., has brought new tax and budget philosophies that are reverberating through the global investment environment. What does this mean for inflation, interest rates and infrastructure development and investment?

### Second chances

As funds mature and investors' needs change, many look to secondary markets to reset and refresh their portfolios. Secondary markets also are a good way for investors new to infrastructure to get exposure relatively quickly.

**Ad reservations due:** July 24

**Ad materials due:** August 7

## October

### Build to core

In a market where it is increasingly difficult to acquire mature core assets, building one from scratch could be an alternative way to achieve this objective. Investing in greenfield or rehabilitating an existing asset for the long-term can result in core assets, but the strategy is not without risks.

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## Crossing paths

The lines between real estate and infrastructure can at times look blurred. But how close an eye should real estate investors keep on infrastructure developments? We look at which real estate sectors are positively aligned with infrastructure and what advantages investors can gain from targeting their investments toward assets with positive interactions.

**Ad reservations due:** August 24

**Ad materials due:** September 6

## November

### Investing in the new infrastructure

The future is investment in the infrastructure associated with big data and smart cities, such as fiber broadband and data centers. We take a look at the opportunities, risks and players.

## Government works

A review of the efforts by governments and agencies globally to make infrastructure procurement, investment and management more aligned with private investors.

**Ad reservations due:** September 25

**Ad materials due:** October 5

## December

### A look ahead

A new year is just around the corner — what ground has been covered and what lies ahead for infrastructure investing in 2019?

**Ad reservations due:** October 25

**Ad materials due:** November 6

*Note: Publication content is subject to change without notice. The editorial calendar for first half 2019 will be available in October.*

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