# INSTITUTIONAL REAL ESTATE
## AMERICAS

The investor-focused global real estate publication

*We are grateful to the members of our Editorial Advisory Board, who represent the interests of our readers, for providing us with their guidance in developing the following editorial calendar.*

# H1 2027 Editorial Calendar

## January

### Fighting for capital

Real estate can no longer assume a fixed place in institutional portfolios. As investors compare opportunities across private credit, infrastructure, private equity and other alternatives, real estate must increasingly prove its relative value and define the role it plays in delivering income, diversification and total return. How does real estate compete for capital when its allocation is no longer guaranteed? What must managers do to make the case for the asset class?

### Center of attention

The data center sector is real estate's most polarizing and intriguing story. Spanning everything from planning constraints, uncertain technological change, social resistance and energy demands — and everything in between — it is understandable that many investors have chosen to stay away from the segment. But if they look beyond the headlines, could they be missing opportunities that bypass infrastructure constraints and concentration risks?

**Ad reservations due:** November 20
**Ad materials due:** December 4

## February

### Can AI fix the marks?

Commercial real estate values have reset, but investors remain skeptical that reported net asset values (NAVs), appraisals and third-party valuations fully reflect executable market pricing. Thin transaction volume, inconsistent valuation practices and questions about who valuation providers ultimately serve continue to complicate price discovery. As investors gain access to more data and artificial intelligence (AI)-enabled analytical tools, can they independently test manager marks and identify where reported values diverge from market reality? How are investors determining which marks they can trust, and could AI improve transparency before transaction volume fully returns?




### The money talks

A report from the *Institutional Real Estate Americas, Europe* and *Asia Pacific* Editorial Advisory Board meetings held in the second half of 2026. What themes are similar around the world? How are leading pension fund executives, fund-of-funds managers, investment advisers and consultants approaching real estate investment strategies given current economic conditions, and what are their plans for 2027?

**Ad reservations due:** December 22
**Ad materials due:** January 4
**Bonus distribution:**
**Institutional Real Estate, Inc.**
2027 Visions, Insights & Perspectives (VIP) Americas
2027 Visions, Insights & Perspectives (VIP) Europe

# H1 2027 Editorial Calendar

## March

### Growth versus alignment

As institutional capital increasingly concentrates in large investment platforms, managers face growing pressure to expand assets under management (AUM), launch new strategies and build broader operating businesses. But growth can create conflicts when management fees, property-level revenues and public-market expectations reward scale. At what point does building AUM begin to work against LPs' interests? How are investors assessing whether managers remain disciplined in strategy expansion, capital deployment and their areas of expertise rather than pursuing growth for its own sake?

### Her journey series

An annual look at female leaders, from those new to the industry to real estate veterans, who share their views and insights on the past, present and future. Please note: There will be a limit on the number of candidates for this piece. In addition, firms that have been featured in the past three years or in consecutive editions are not eligible for consideration. Potential interviewees should contact editor Andrea Zander by Jan. 10.

**Ad reservations due:** January 22
**Ad materials due:** February 5
**Bonus distribution:**
**Institutional Real Estate, Inc.**
2027 Editorial Advisory Board Meeting – *Real Assets Adviser*

## April

### Mighty micro-locations

The mantra of real estate has always been "location, location, location." But in a world fraught with geopolitical concerns, rising interest rates and supply-chain issues — to name just a few — enhanced selectivity is key. How can forensic investors best identify and target precise micro-locations for investment in gateway and emerging markets, and how might that vary by property type and global region?

### Earning the return

For most of the previous cycle, falling interest rates, cap-rate compression and rising asset values helped drive commercial real estate returns. That environment has changed. Investors are placing greater emphasis on managers that can generate net operating income (NOI) growth through leasing, tenant retention, expense control, capital improvements and other property-level execution rather than relying on a more favorable financing or valuation environment. Where are managers finding real opportunities to create NOI today? How are investors distinguishing operational value creation from returns driven by market movement, leverage or acquisition basis?

**Ad reservations due:** February 2
**Ad materials due:** March 5
**Bonus distribution:**
**Institutional Real Estate, Inc.**
2027 Spring Editorial Advisory Board Meeting – *Institutional Real Estate Americas*

## May

### Buy, fix, sell

Closed-end real estate funds were built around a relatively straightforward proposition: Buy an asset, execute the business plan, sell it and return capital to investors. But slower transaction markets and the growth of continuation vehicles and other recapitalization structures are extending ownership beyond traditional fund timelines. When does extending a successful investment serve LP interests, and when should managers simply sell and return the capital? As investors place greater emphasis on distributions to paid-in capital (DPI) and liquidity, is traditional buy-fix-sell discipline becoming an increasingly important measure of investor/manager alignment?

### Survey says

Every year, Institutional Real Estate, Inc. surveys institutional investors around the world to determine their investment intentions. We take a close look at the results of the annual investor survey and review the implications of the report's findings.

**Ad reservations due:** March 22
**Ad materials due:** April 5

## June

### Age reshapes demand

U.S. real estate and infrastructure investors have spent years preparing for the "silver tsunami," when

# H1 2027 Editorial Calendar

aging baby boomers are expected to drive demand for sectors such as seniors housing, healthcare and age-oriented services. But demographic investing cannot stop with one generation. What happens to assets built around today's aging population as that cohort declines and the next generation brings different needs, preferences and behaviors? How far into the future should investors underwrite generational behavior? Are demographic themes durable enough to support long-term investment strategies, or do investors need to build greater flexibility into assets and infrastructure as preferences change?

## Beyond the buckets

Institutional portfolios may appear diversified across real estate, infrastructure, private equity, private credit and public markets, but traditional asset-class labels may mask meaningful overlap in risk exposures. As strategies increasingly share common economic drivers, liquidity characteristics and holding periods, investors are rethinking whether diversification should be measured by buckets alone or by the underlying sources of portfolio risk. How are institutions measuring diversification across assets with very different liquidity profiles and holding periods? Does a total portfolio approach provide a more useful framework for assessing these risks, or can traditional asset-allocation models be adapted? How are investment committees changing the way they discuss diversification, concentration and portfolio-level risk?

**Ad reservations due:** April 20
**Ad materials due:** May 4
**Bonus distribution:**
**Institutional Real Estate, Inc.**
2027 Visions, Insights & Perspectives (VIP)
Infrastructure

*Note: Publication content is subject to change without notice. To be interviewed for one of the above topics, contact the editor three months prior to publication. Publications may be distributed at additional industry events. The editorial calendar for full-year 2027 will be available in March 2027.*

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*October 5, 2026*

*Institutional Real Estate Americas* is a publication of Institutional Real Estate, Inc.