

INFRASTRUCTURE & RENEWABLES | APRIL 22, 2PM EASTERN TIME

In the third session of a new and regular series with CIM focused on real assets, we turn our attention to **Infrastructure**.

If we've learned anything over the past 12 months it's that there is a large and growing need to invest in infrastructure assets and platforms that support the improvement, sustainability and digitalization of infrastructure across North America. In this hour long call we'll target different segments of the infrastructure market and address what has changed and how it will provide opportunities going forward.

WHAT DIRECTION IS INFRASTRUCTURE HEADING IN?

Cities will be looking for solutions to their infrastructure needs due to budget constraints especially in waste/water management, transportation and social infrastructure.

As essential services for society continue to evolve, modern demands of the information era and the effects of climate change will require profound growth in private capital investment in digital and renewable infrastructure which were not traditionally funded by public funding resources.



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We'll touch on these four segments their challenges and opportunities:

Digital Infrastructure

- **Challenge:** Traditionally considered niche real estate assets
- **Solution:** Telecommunication assets established their position as essential services providers
- Digital infrastructure is positioned to benefit from the rapidly growing demand for data services and that owning physical assets will provide the potential for attractive risk-adjusted returns with downside protection.

Transportation / Social Infrastructure

- COVID-19-related restrictions in population mobility have accelerated the demand growth for goods to come to people where they live.

Renewable Energy

- **Challenge:** Abrupt drop in cash generation likely to drive covenant breaches for highly-levered traditional energy assets
- **Solution:** Combined with energy storage solutions, renewable energy generation projects can provide the much-needed grid reliability support

Waste / Water Management

- **High barriers to entry:** Disposal and treatment sites that are capital-intensive, highly regulated or hard-to-permit real assets
- **Stable cash flow:** Supported by medium-to-long term contracts with municipalities with strong and sustainable demographic growth

OTHER UPCOMING EVENTS IN THE REAL ASSETS SERIES:

May 19, 2pm Eastern Time

[Opp Zones: Policy Updates & Distress](#)

June 16, 2pm Eastern Time

[Data & Cloud Warehousing & Social Infrastructure Changes](#)