

Welcome to the latest edition of Infrastructure Spotlight, the monthly newsletter from Preqin providing insights into infrastructure performance, investors, deals and fundraising. Infrastructure Spotlight uses information from our online product Infrastructure Online.

April 2012  
Volume 4 - Issue 4

FEATURED PUBLICATION:

The 2012 Preqin Global Infrastructure Report



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# Infrastructure Spotlight

April 2012

## Feature Article

### Sovereign Wealth Funds Investing in Infrastructure

Sovereign wealth funds are significant investors in alternative assets and have become increasingly important in the infrastructure space. This month's feature article, using data compiled for the 2012 Preqin Sovereign Wealth Fund Review, takes an in-depth look at the investment preferences of this powerful group of investors.

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## Industry News

A round-up of the latest news from all over the world, including details of the pension fund looking for PPP/PFI opportunities, the pension fund that is about to make its first infrastructure investment, and the opportunistic investment strategy being pursued by one Australian superannuation scheme.

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## Fundraising

A look at the demand for a Europe-focused primary infrastructure fund in the current fundraising market

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## The Facts

[Asia Pacific Investors](#) - An analysis of investors based in Asia-Pacific - [Page 8](#)

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[Asia Pacific Fund Managers](#) - A look at the fund managers based in Asia Pacific - [Page 11](#)



You can download all the data in this month's Spotlight in Excel.

Wherever you see this symbol, the data is available for free download on Excel. Just click on the symbol and your download will begin automatically. You are welcome to use the data in any presentations you are preparing, please cite Preqin as the source.

# Sovereign Wealth Funds Investing in Infrastructure

Sovereign wealth funds are significant investors in alternative assets. [Iain Jones](#) takes a look at their increasing prominence in the infrastructure space.

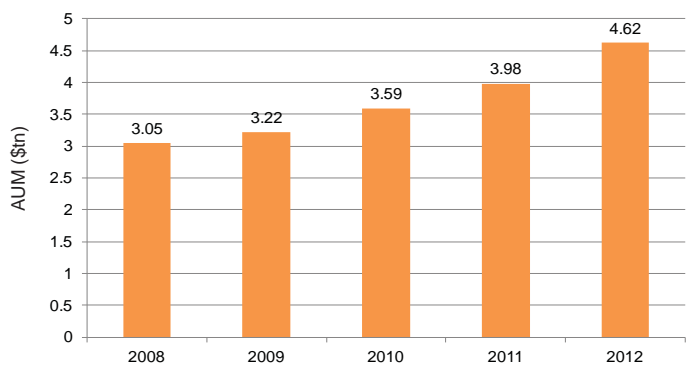
In recent years, sovereign wealth funds have begun to play an increasingly important part in the infrastructure investor landscape, gaining significant exposure through both infrastructure funds and direct investments. Infrastructure assets appeal to sovereign wealth funds as they offer the potential for steady, inflation-linked cash flows over long time periods. These characteristics make infrastructure assets a good fit for sovereign wealth funds, which operate under long-term investment horizons and are not constrained by the liquidity requirements that can affect pension funds and insurance companies. In addition, a number of sovereign wealth funds gain exposure to infrastructure through debt and equity investments made to aid the development of their home economies. The following article aims to provide an overview of the sovereign wealth funds investing in infrastructure, exploring their characteristics and investment preferences before considering future trends within the market.

## Overview of Sovereign Wealth Funds

As shown in Fig. 1, sovereign wealth funds have grown their aggregate assets under management significantly since 2011, reporting an increase of 16%. One explanation for this is that a number of new sovereign wealth funds have launched and many of these funds are now fully operational, or are gearing towards putting their capital to work. In addition, while 2009 and 2010 saw several large sovereign wealth funds facing capital withdrawals in order to balance governmental fiscal shortfalls, this activity has now tapered off.

Asia and MENA are home to the largest numbers of sovereign wealth funds, and account for 54% of these institutions between them. Furthermore, funds based in the two regions make up more

Fig. 1: Aggregate Sovereign Wealth Fund Assets under Management, 2008-2012



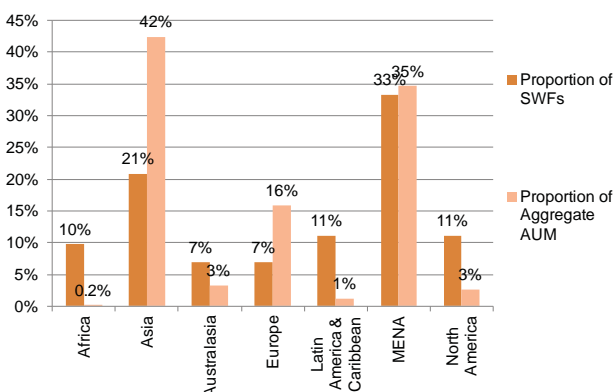
Source: Preqin

than three-quarters of the aggregate value of all such institutions worldwide, as shown in Fig. 2. This is unsurprising given the fact that Asia and MENA are home to two of the three largest sovereign wealth funds in the world, and many other large sovereign institutions beside that.

## Sovereign Wealth Funds Investing in Infrastructure

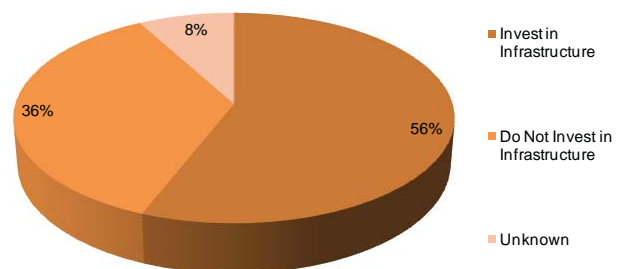
As shown in Fig. 3, 56% of all sovereign wealth funds are known to be actively investing in infrastructure in 2012, while 36% do not commit capital to the asset class, and information is unknown for the remaining 8%. The number of sovereign wealth funds investing in the asset class increased from 47% in 2010 to 61% in 2011, before falling back to 56% in 2012. This decrease can be explained

Fig. 2: Breakdown of Sovereign Wealth Funds by Location



Source: Preqin

Fig. 3: Proportion of Sovereign Wealth Funds Investing in Infrastructure



Source: Preqin

by a number of new sovereign wealth funds launching, with some of these newer institutions yet to establish alternative investment programs.

Fig. 4 provides a breakdown of sovereign wealth funds investing in infrastructure by total assets. Of these investors, 41% have more than \$50bn in total assets under management, 40% have between \$10 and \$49bn and 19% have less than \$10 bn. Abu Dhabi Investment Authority is one of the largest sovereign wealth investing in the infrastructure asset class. It has an estimated \$627bn in assets under management and operates a 5% allocation to infrastructure.

**Route to Market of Sovereign Wealth Funds investing in Infrastructure**

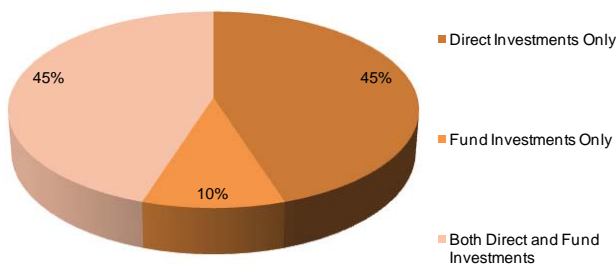
As shown in Fig. 5, 90% of sovereign wealth funds gain exposure to infrastructure through direct investments, demonstrating both the size and sophistication of these institutions in the infrastructure space. Of these investors, 45% will only invest in infrastructure through direct investments, while the other 45% will invest through fund commitments as well as direct investments. Only 10% of sovereign wealth funds active in infrastructure invest solely through co-mingled vehicles.

**Sovereign Wealth Funds Active in Infrastructure by Geographic Preferences**

The popular areas for infrastructure investments by sovereign wealth funds are Asia and Europe. Forty-five percent of sovereign wealth funds that invest in the asset class target opportunities in Asia, with the same proportion having a preference for Europe. In comparison, 42% seek infrastructure investments in North America, while MENA is favoured by 32%. The majority of the sovereign wealth funds investing in the MENA region are domestic investors such as Dubai International Capital and Abu Dhabi Investment Council, which have an emphasis on domestic development.

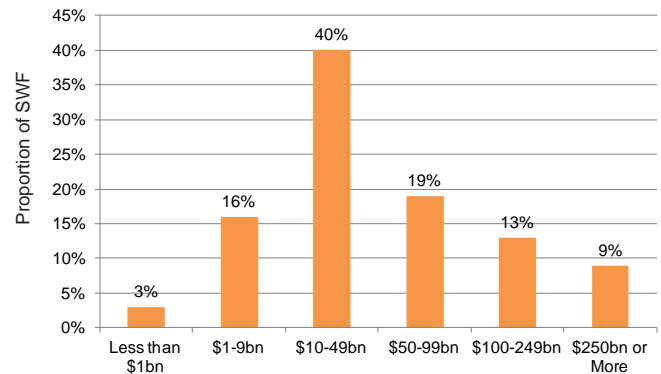
In the last year there has been a marked increase in the number of sovereign wealth funds targeting global infrastructure investments. At present, 52% of the sovereign wealth funds investing in infrastructure target global investments, a significant increase on last year's figure of 41%. This desire among sovereign wealth funds

Fig. 5: Sovereign Wealth Funds Investing in Infrastructure by Route to Market



Source: Preqin

Fig. 4: Sovereign Wealth Funds Investing in Infrastructure Split by Total Assets



Source: Preqin

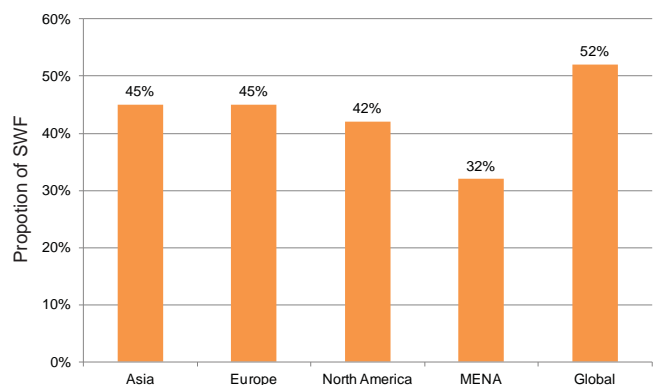
to acquire a globally diversified infrastructure portfolio suggests that whilst many of these investors historically gained exposure as a means of aiding development in their home nations, now more and more are seeking infrastructure assets for the value they can add to an investment portfolio.

**Outlook**

Infrastructure remains an important asset class for sovereign wealth funds due to the intrinsic characteristics of the assets and the overall strategic goals of many such institutions. We would therefore expect these institutions to continue committing capital to the asset class, both domestically and globally, through direct investments and commingled infrastructure funds going forward.

Encouragingly we are seeing a greater number of sovereign wealth funds aiming to create globally diversified infrastructure portfolio, representing a change in focus from a pure developmental infrastructure investment strategy to a twin strategy pursuing infrastructure assets for diversification and stable investment returns.

Fig. 6: Geographic Investment Preferences of Sovereign Wealth Funds Active in Infrastructure



Source: Preqin

# Preqin Industry News

Claire Wilson delivers a round-up of the latest infrastructure news, featuring exclusive intelligence uncovered by Preqin's analysts. Preqin Online subscribers can click on the investor/firm/asset names to view the full profiles.

Looking to make its first infrastructure investment, [BASF Pension Fund](#) is looking for opportunities in both the unlisted and listed sectors. It will consider investing in a variety of industries including cleantech, transportation and natural resources. The EUR 15.2bn private sector fund, which has a global investment mandate, maintains a small target allocation to the asset class.

[UniSuper](#), which has a AUD 1.5bn allocation to infrastructure, is considering new investments on an opportunistic basis. While it usually invests globally, it is only looking for domestic investments this year although it will pursue opportunities in a range of industries. The AUD 33bn Australian superannuation scheme is currently at its strategic allocation to the asset class, 4.5% of AUM, and has a portfolio of directly owned assets and private and listed fund commitments.

Elsewhere, [Korean Teachers' Credit Union](#) has announced that it is keen to make PPP/PFI infrastructure investments. The pension fund has previously invested in a toll road in Korea as part of a partnership with the Korean government and will consider investing in a range of industries across all project stages.

## Data Source:

### Preqin Infrastructure Online

Preqin's Infrastructure Online is the industry's leading source of intelligence on the unlisted infrastructure fund industry. This constantly updated resource includes details for all aspects of the asset class, including fund performance, fundraising data, institutional investor profiles, fund manager profiles and more.

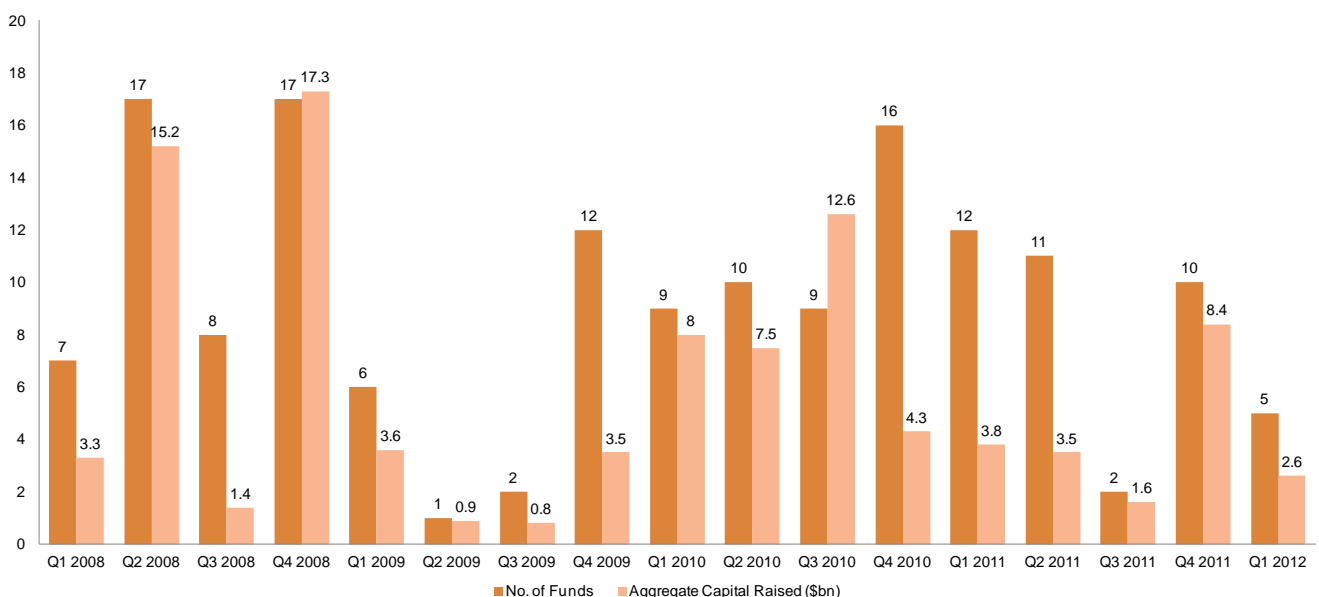
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## Chart of the Month: Quarterly Unlisted Infrastructure Fundraising



Source: Preqin

# 2012 Preqin Global Alternatives Reports



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# Fundraising Assignment

Iain Jones takes a look at demand for a primary, Europe-focused fund in the current fundraising market

## Fundraising Assignment

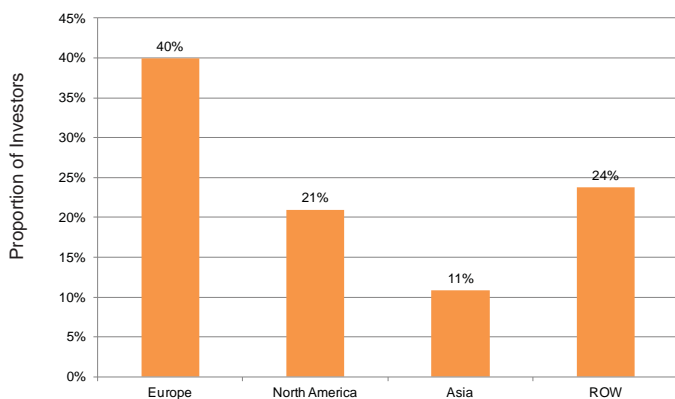
<b>Fund Strategy</b>	Primary
<b>Target Fund Size (USD)</b>	350 million
<b>Target Fund Size (USD)</b>	350 million
<b>Geographic Focus</b>	Europe
<b>Track Record</b>	First-time fund
<b>Subsector Focus</b>	Energy, Renewable Energy

In this month's fundraising spotlight, we use exclusive information from Preqin's Infrastructure Online database to examine the institutional appetite for the unlisted infrastructure fund presented above. This vehicle is being raised by a first-time fund manager and is targeting USD 350mn for investment in European energy-infrastructure and renewable energy assets and projects. To begin, we shall filter the 1,484 LPs currently active in infrastructure to create a long list of potential fund investors. Following this, we shall drill down further and establish a short list of highly targeted infrastructure investors that represent good potential partners for this fund manager.

### The Long List

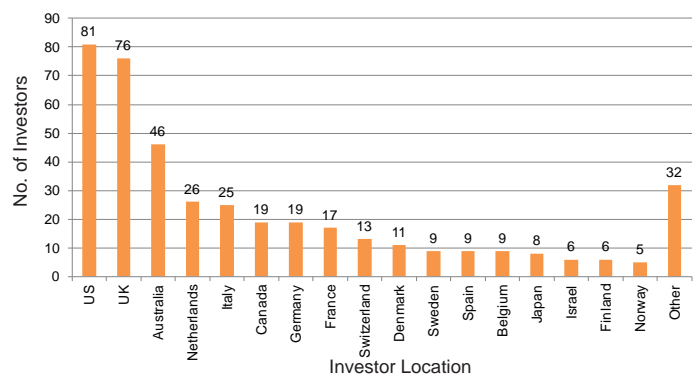
Preqin's Infrastructure Online universe shows 417 institutional investors potentially interested in the strategy outlined in the fundraising assignment, reflecting the popularity of primary infrastructure equity funds focused on core strategies in developed markets. These investors make up 28.1% of the total infrastructure LP universe and have invested an average of USD 544 million in the asset class. Fig. 1 provides a breakdown of these potential investors by location, with the established institutional markets of US, UK and Australia accounting for 81, 76 and 46 potential investors respectively.

Fig. 2: Proportional Appetite of Investors by Region



Source: Preqin

Fig. 1: Breakdown of Investor Appetite by Location



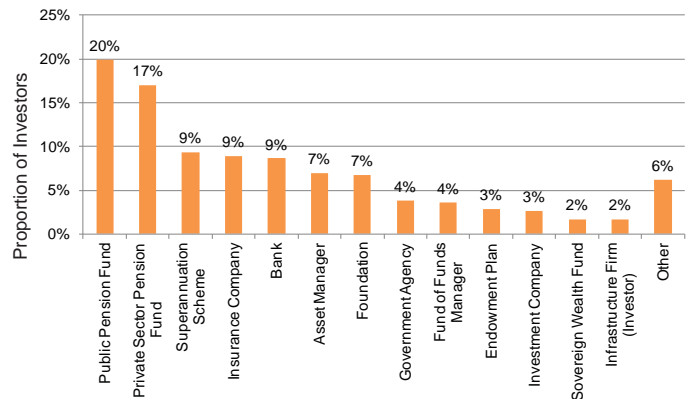
Source: Preqin

Given the fund's focus, it is unsurprising that Europe is the region with the greatest number of potential investors, 58% of the total. North America is next with 24%, ahead of Asia (4%), and the rest of the world (15%), with the latter group predominantly made up of Australian investors. Fig. 2 shows the proportion of LPs in each region with a potential appetite for this fund. Forty percent of European investors made the long list, along with 21% of North American LPs, 11% of Asian LPs and 24% of investors located in other geographic areas.

Public pension funds are the most likely investors in the fund, making up 20% of the long list of investors, followed by private sector pension funds, 17%, superannuation schemes, insurance companies, and banks, all with 9%.

Fig. 4 shows potential investors in the fund as a proportion of their specific investor type. It shows that 53% of all superannuation

Fig. 3: Breakdown of Appropriate Investors by Type



Source: Preqin

schemes are potential partners for our fund, along with 44% of infrastructure firms, and 36% of fund of funds managers. Whilst public and private pension funds account for the largest number of potential investors, these LPs represent just 31% and 28% of the total number of public and private sector pension funds respectively.

**Further Filters**

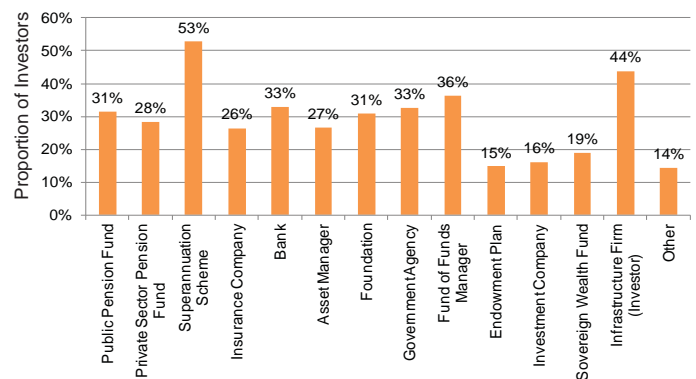
Of the 417 institutions with a potential appetite for this fund, 71 have known unfulfilled target allocations to the infrastructure asset class. These institutions are looking to actively build their infrastructure portfolios, as opposed to LPs that are investing opportunistically to maintain commitment levels, and therefore represent strong potential partners for the fund. The 71 institutions have median assets under management of USD 11.1 billion, median current allocations to infrastructure of 2.2% and median target allocations to infrastructure of 4%.

Fifty-two percent of investors within this group are from Europe, followed by 35% from North America and 13% from the rest of the world. In addition, whilst public and private pension funds account for 37% and 25% of investors respectively, a total of 11 institutional types are included in the list.

**The Short List**

Fig. 5 shows three of the 71 investors, selected from the 1,484 currently active on infrastructure online, that are good potential partners for the fund presented above. These LPs all hold a preference for European infrastructure exposure in areas such as energy and renewable energy, they will consider investing in unlisted funds managed by first-time GPs and have an unfulfilled target allocation to infrastructure, indicating a desire to make commitments during 2012.

Fig. 4: Proportional Appetite of Investors by Type



Source: Preqin

**Subscriber Quicklink:**

Subscribers to Preqin’s Infrastructure Online can click here for a list of the 469 institutional investors that hold a preference for primary unlisted infrastructure funds focused on European energy and renewable energy opportunities.

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Fig. 5: The Short List

Investor	Type	Location	Details
Capital Innovations Infrastructure Partners	Infrastructure Fund of Funds Manager	US	<ul style="list-style-type: none"> <li>Targets energy and renewable energy investments as part of a diversified strategy.</li> <li>Will invest with first-time fund managers and holds a preference for those vehicles that can offer bespoke fee structures.</li> <li>Typically invests between USD 5-50 million in each fund.</li> <li>Closed over USD 1 billion through two fund of funds, also manages separately managed accounts.</li> </ul>
Electrolux Pension Fund (Sweden)	Private Sector Pension Fund	Finland	<ul style="list-style-type: none"> <li>Large, by percentage of total assets, unfulfilled target allocation to infrastructure.</li> <li>Preference for funds targeting core assets in OECD nations.</li> <li>Willingness to invest in both experienced and first-time fund managers.</li> </ul>
Merseyside Pension Fund	Public Pension Fund	UK	<ul style="list-style-type: none"> <li>Invests globally but holds a preference for European focused funds.</li> <li>Previous investment in energy and renewable energy specific infrastructure funds.</li> <li>Typically invests between GBP 5-20 million per fund.</li> </ul>



# Asia-Pacific Investors

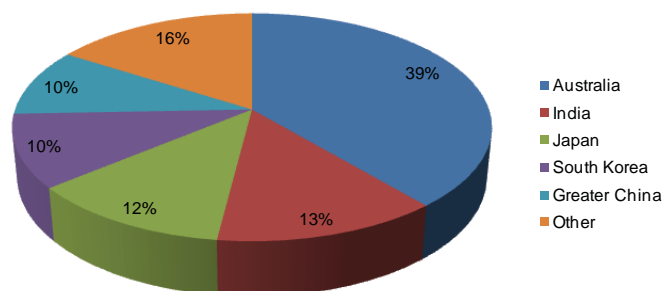
Ee Fai Kam looks at the infrastructure investors based in Asia-Pacific

Fig. 1: Key Facts: Asia Pacific Investors in Infrastructure

Number of Investors Based in Asia-Pacific	250
Median AUM (USD bn)	7.2
Mean Current Allocation to Infrastructure	7.0%
Mean Target Allocation to Infrastructure	10.3%

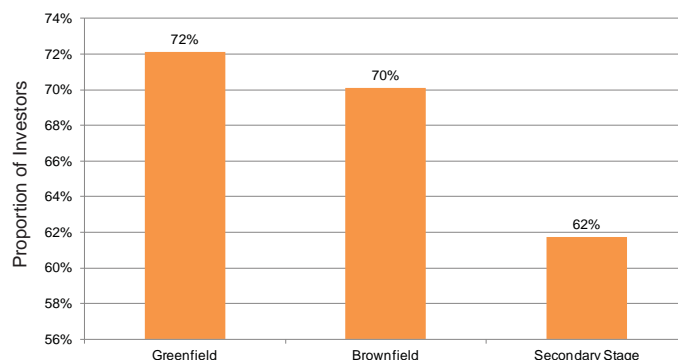
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Fig. 2: Breakdown of Asia-Pacific Investors in Infrastructure by Location



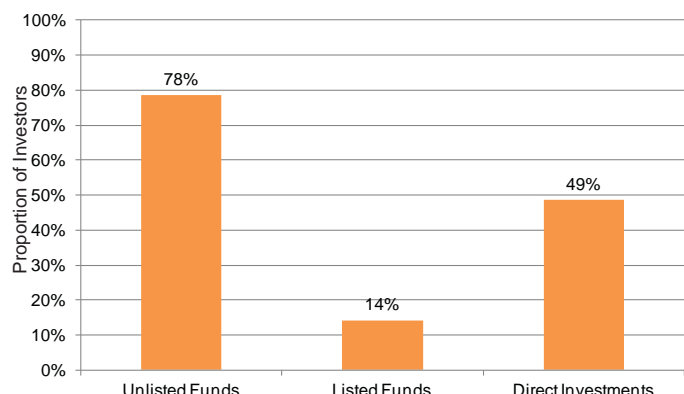
Source: Preqin

Fig. 4: Proportion of Asia-Pacific LPs Investing in Each Infrastructure Project Stage



Source: Preqin

Fig. 3: Routes to Market Used by Asia-Pacific Investors in Infrastructure



Source: Preqin

Fig. 5: Five Key Asia-Pacific Investors in Infrastructure

Investor	Location	Funds Under Mgmt (USD bn)	Current Allocation to Infrastructure (%)
Access Capital Advisers	Australia	12.2	25.0
AustralianSuper	Australia	45.5	11.6
Korea Life Insurance	Korea	65.0	3.9
Asian Development Bank	Philippines	85.7	2.7
New Zealand Superannuation Fund	New Zealand	14.5	10.6

Source: Preqin



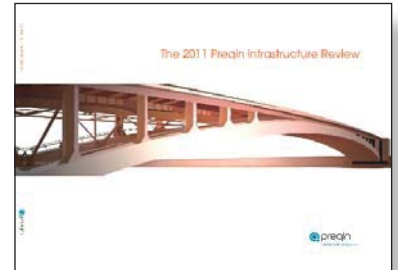
# 2011 Preqin Infrastructure Review



Now in its fourth year, the [2011 Preqin Infrastructure Review](#) represents the most comprehensive examination of the unlisted infrastructure asset class ever produced.

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- Detailed listings of all funds ever closed, plus funds currently raising capital.
- Information gathered by our dedicated team of analysts from numerous data sources, including via direct interaction with fund managers and investors to ensure the information in the Review is as accurate, comprehensive and exclusive as possible.



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# Infrastructure Deals

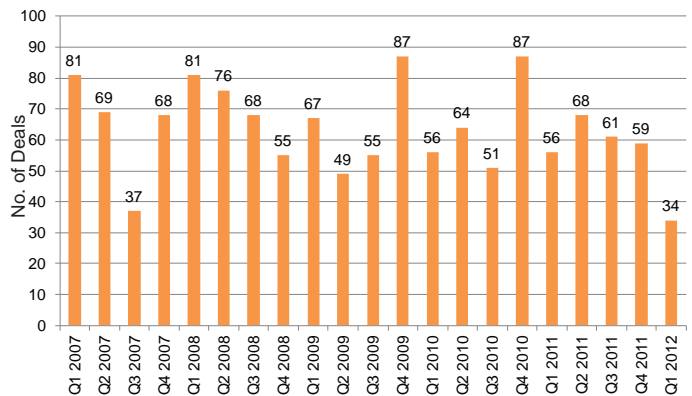
Iain Jones takes a look at the latest stats from the deals market

A total of 34 deals were reported by unlisted infrastructure fund managers in Q1 2012. As shown in Fig. 1, this represents a slight drop from the number of deals completed in each quarter during 2011, when 244 total deals were finalised by infrastructure firms. Although the total number of deals completed in Q1 2012 is expected to rise as more information becomes available, the general plateau in deal activity since 2008 is indicative of the tough conditions facing fund managers in the current market, coupled with the relative scarcity of affordable long-term debt financing.

In addition to constricted deal flow, the average infrastructure deal value in Q1 2012 was slightly below that of recent years. As shown in Fig. 2, the average infrastructure transaction for the period amounted to \$300mn, less than the corresponding figures in both 2010 and 2011. Despite this drop off however, infrastructure fund managers are still able to successfully close sizeable deals in the current market environment with a few \$1bn+ transactions reaching financial close in Q1.

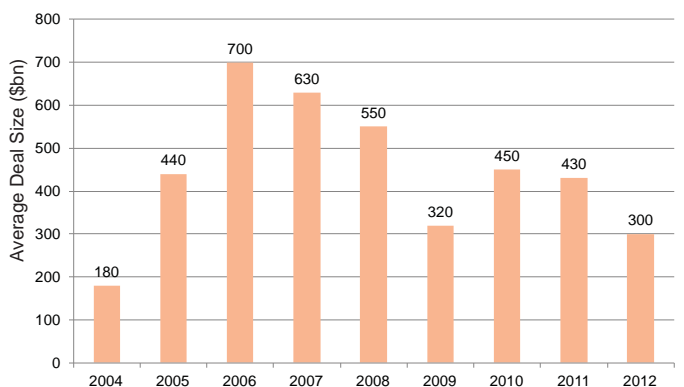
Fig. 3 provides a regional breakdown of deals completed by infrastructure fund managers since 2011. While Europe remains the dominant region, accounting for 45% of all transactions completed since Q1 2011, more deals were made in North America than in Europe during Q1 2012. Fifteen deals involving North American assets were finalized in Q1 2012, while 13 were completed in Europe and six were made in Asia and Rest of World. In terms of industry, core sectors were the most prominent during this period. A total of 28 deals were made in the energy, transportation and utilities sectors, equating to 82% of the total.

Fig. 1: Quarterly Number of Deals Made by Unlisted Infrastructure Fund Managers, Q1 2007 - Q1 2012



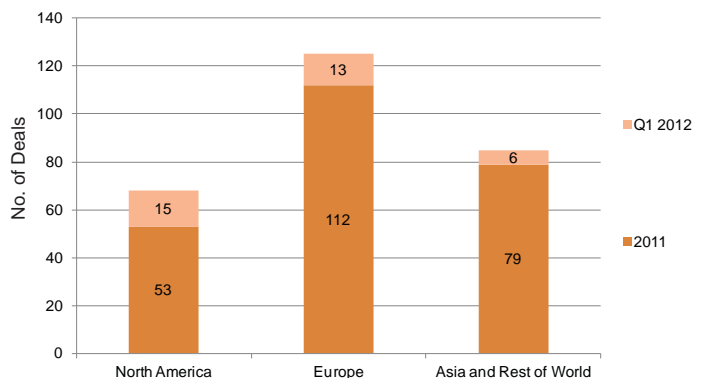
Source: Preqin

Fig. 2: Annual Average Deal Size, 2004 - Q1 2012



Source: Preqin

Fig. 3: Number of Infrastructure Deals by Region, 2011 - Q1 2012



Source: Preqin

## Data Source

There are 2,071 deals logged on Infrastructure Online. The product contains financial information for 823 deals worth a combined \$471,514 million.

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# Asia-Pacific Fund Managers

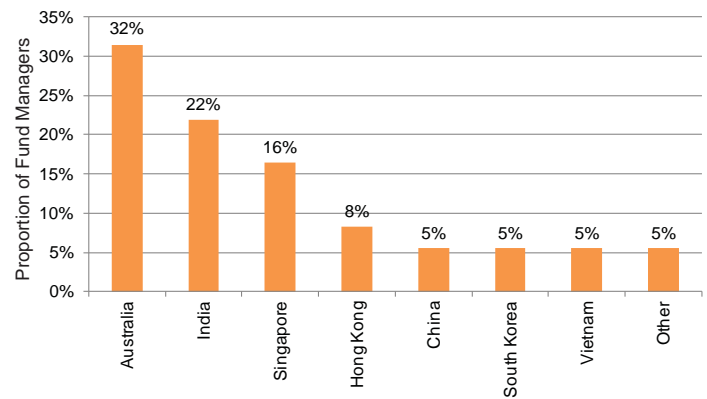
Ee Fai Kam reveals all about infrastructure managers based in Asia-Pacific

Fig. 1: Key Facts: Asia-Pacific Fund Managers

Number of Asia Pacific Fund Managers	73
Total Number of Asia Pacific Managed Funds	125
Aggregate Capital Raised (USD bn)	39.0
Number of Funds on the Road	30
Aggregate Capital Sought (USD bn)	17.2

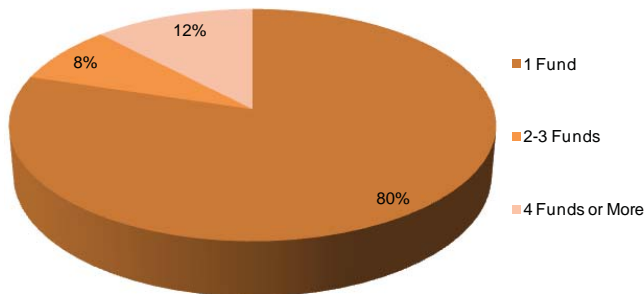
Source: Preqin

Fig. 2: Breakdown of Asia-Pacific Fund Managers by Country



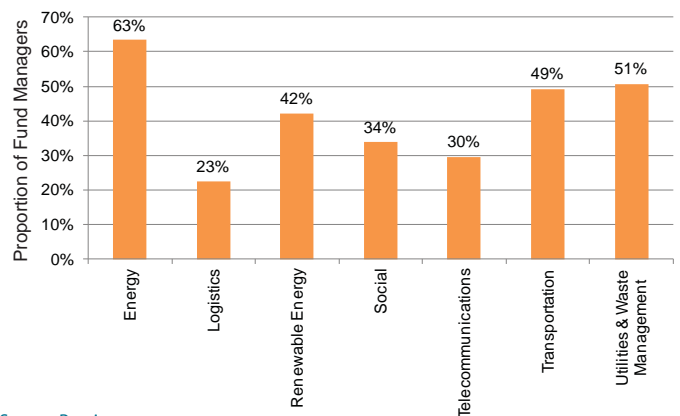
Source: Preqin

Fig. 3: Breakdown of Asia Pacific Fund Managers by Number of Funds Launched



Source: Preqin

Fig. 4: Industry Sector Preferences of Asia-Pacific Fund Managers



Source: Preqin

**Data Source:**

Infrastructure Online has detailed profiles of 73 Asia Pacific infrastructure fund managers.

For more information please visit

[www.preqin.com/infrastructure](http://www.preqin.com/infrastructure)

# Conferences Spotlight

Conference Name	Date	Location	Organizer
2nd Annual Infrastructure and Energy Finance West Conference	22 - 23 May 2012	San Francisco	Euromoney Seminars
Smart Cities World MENA	4 - 6 June 2012	Dubai	Terrapinn
Infrastructure Investment World Europe	5 - 7 November 2012	London	Terrapinn

### Infrastructure and Energy Finance West Conference

**Date: 22 - 23 May 2012**

**Location: San Francisco, United States**

**Organiser: Euromoney Seminars**

- Expert insight from Government officials on their PPP programs
- Network with industry leaders including sponsors, financiers, lawyers, government officials and more
- Find creative approaches to move project finance deals forward and overcome the funding gap
- 15% discount code: IW15

Information: [www.euromoneyseminars.com/infrwest12](http://www.euromoneyseminars.com/infrwest12)

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**GEOFFREY SPENCE**  
Chief Executive, Infrastructure UK, HM Treasury  
**JOANNE SEGARS**  
Chief Executive, National Association of Pension Funds

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