

# GLOBAL INFRASTRUCTURE INDUSTRY SURVEY

The Global Crisis • March 19-30th, 2020

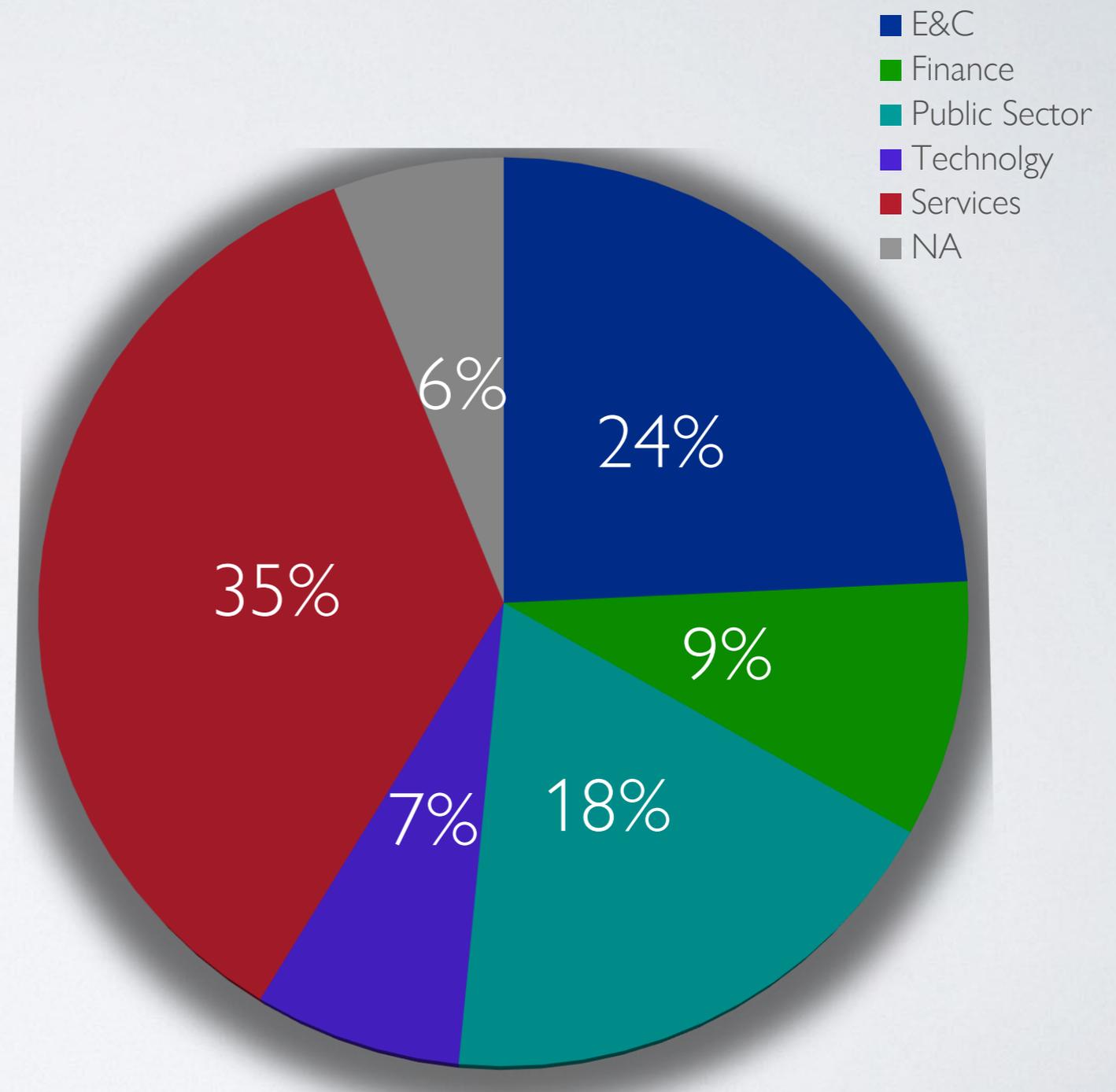
airport water treatment country key energy also will highways  
infrastructure transit need Water Wastewater  
investment cities priority project health important Water

# SURVEY PROFILE

★ Survey was sent to 13,067 across 50 countries

★ Breakdown is the following

- Engineering/Construction
- Finance
- Public Sector
- Technology
- NA

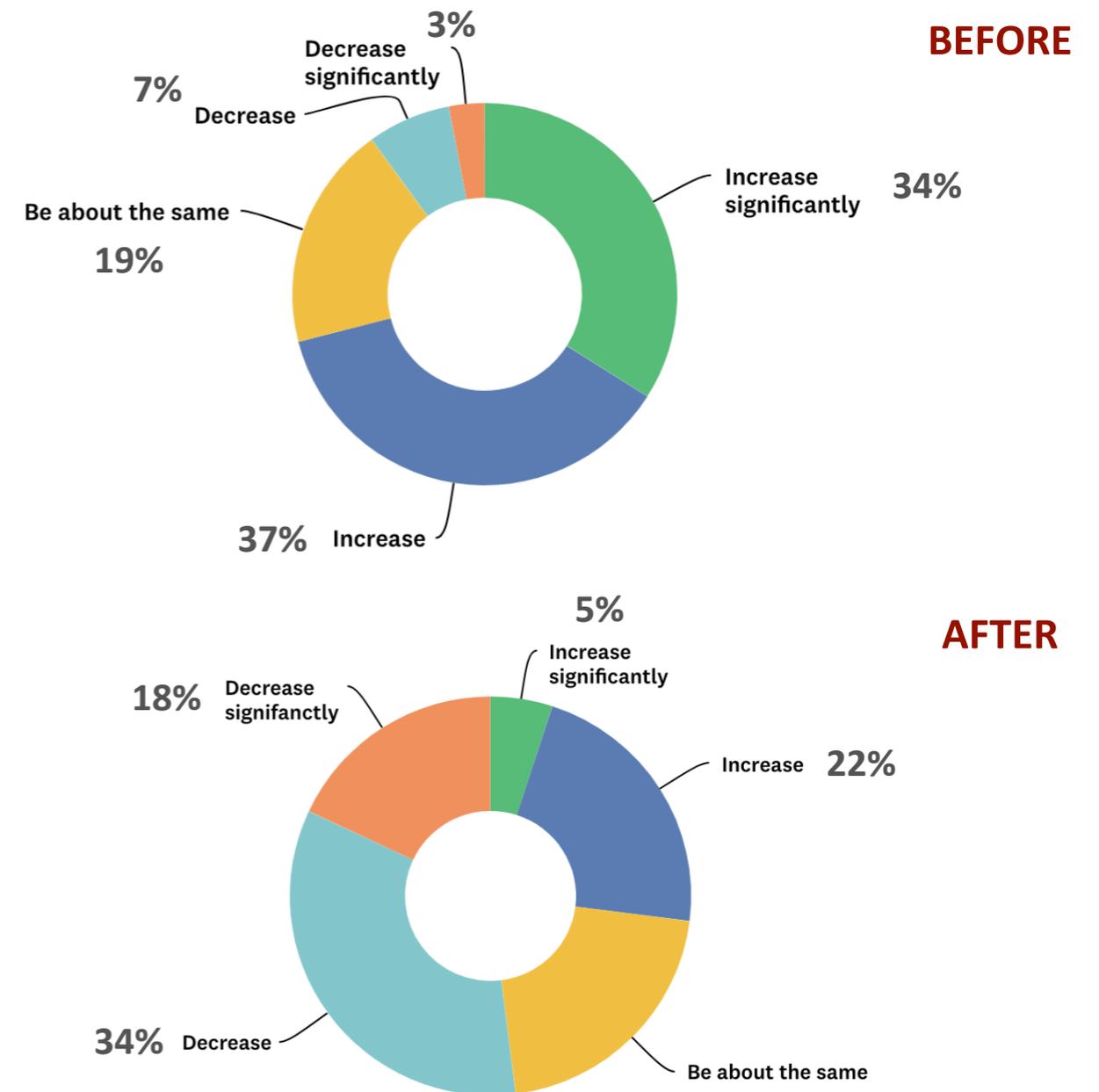


# INFRASTRUCTURE INVESTMENT PROJECTIONS (BY RESPONDENTS)

★ Expectations for infrastructure investment in countries have plummeted at a time when that investment is most needed

- ☛ Only 5% believe that investment will “increase significantly” as against 34% before the crisis
- ☛ And whereas prior to the crisis 37% thought it would ‘increase’ only 22% now believe that infrastructure investment will increase
- ☛ So prior to the crisis 71% of respondents believed that infrastructure investment would increase or increase significantly, and with the crisis that number is only 27%

★ Prior to the crisis only 10% of respondents thought that infrastructure investment would decrease (7%), or decrease significantly (3%), but now a majority of 52% believe that infra investment will decline (34%) or decline significantly (18%).



**Note:** Answers from Executives w/ Knowledge of Local Reality

# AREAS IN WHICH INVESTMENT IS MOST NEEDED

★ **Social Infrastructure**, often ignored, is clearly the most needed (28% selected this as their #1 priority, and 55% as one of their top 3 priorities)

★ **Clean Water** was highlighted as the #1 priority by 14% (and was listed in a top 3 priority by 48% of respondents)

★ Both **Transit** and **Highways** were listed as top priorities by 12% of respondents (in terms of top 3 transit was selected by 42%, and highways by 34%)

★ **Wastewater** was selected as a top priority by 11% of respondents (it was a top 3 priority by 41% of respondents)

★ No other areas of infrastructure reached 10% as a #1 priority, including **electricity** (6%)



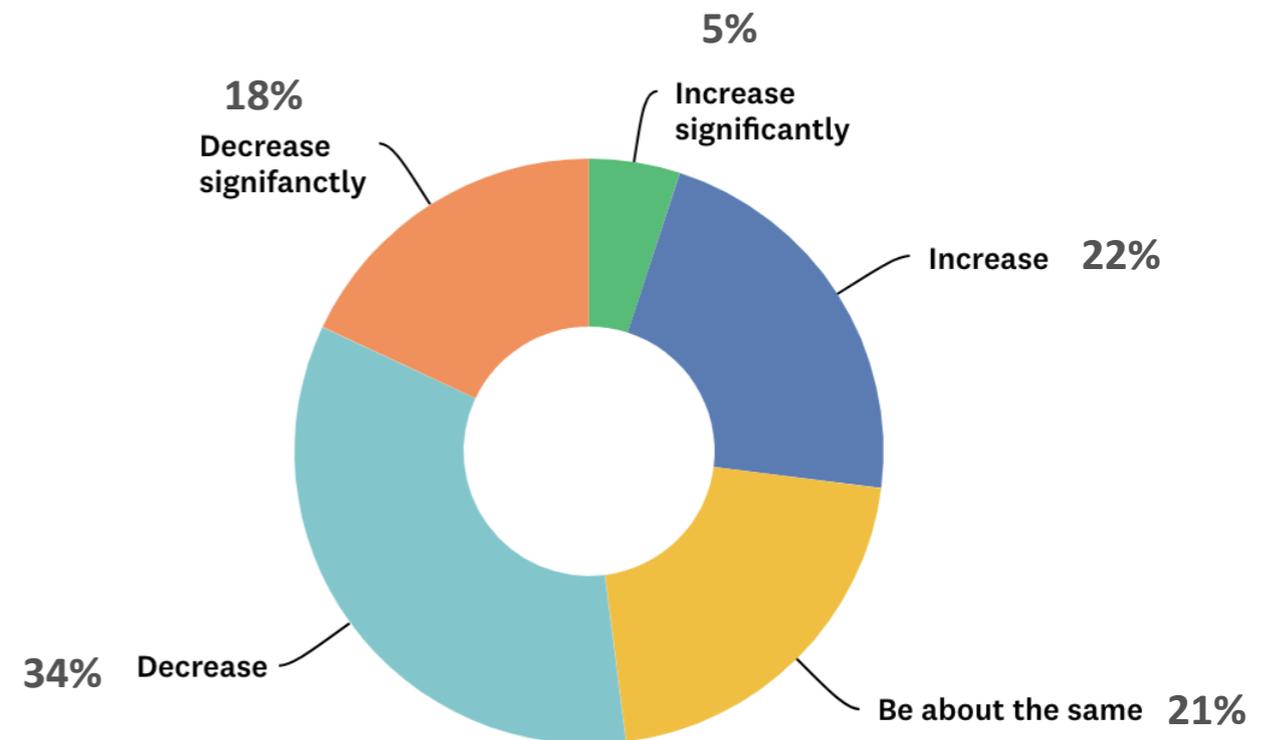
# SUMMARY OF SURVEY RESULTS I

- ★ **The Overall Story** - People believe that infrastructure investment has increased since 2015, but that corruption and lack of focus are a big issue.
- ★ **Priorities** - Priorities focus on social infrastructure, rather than more clearly economic projects. One big question: which projects to undertake?
- ★ **Leadership** - People are confused, and in need for leadership (and doubtful of the leadership they have)
- ★ **Finance/Investment** - No one knows where the money will come from, particularly given that developing countries were relying on private investment, and that has fallen off a cliff. Virtually no mention of PPP's.

# OVERALL ASSESSMENT

- ★ There is no chance that the kind of infrastructure investments required to power recoveries is going to happen, particularly in developing countries.
- ★ The brand is too weak to carry an initiative
- ★ Project selection needs to focus on key initial projects bringing high quality benefits (social, water, wastewater, etc.)
- ★ There is really no workable financing model - n mentions PPP's as the solution
- ★ Need a new investment model
- ★ Need a PR campaign highlighting benefits
  - 📍 health
  - 📍 opportunity
  - 📍 jobs
  - 📍 growth
- ★ Need to highlight leadership

**AFTER COVID 19**



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