Structure of presentation

1. Introduction to the Global Infrastructure Hub
2. Global Infrastructure Outlook + Q&A
3. InfraCompass + Q&A
Introduction to Global Infrastructure Hub

1. G20 - backed initiative
2. Focused on ‘bankable’ infrastructure projects in all markets
3. Impartial and open-source data
4. Aim to lift global economic growth
Global Infrastructure Outlook
Forecasts of Infrastructure investment needs and gaps for 50 countries and 7 sectors.

Why?

1. **Demand** for detailed global, regional, country and sector-level forecasts

2. Data helping government **better plan** infrastructure
Summary of forecasts 2016-2040 inc. SDGs

- Current Trends: $78,782 billion
- Need: $93,653 billion
- Need + SDG: $97,195 billion

+$14,871 billion
+$18,413 billion
Methodology

Electricity stock per person - India

$USD per person

2015 2040 current trend 2040 investment need

Electricity infrastructure investment forecast - India

$USD per person

$140 $120 $100 $80 $60 $40 $20 $-

2016 2018 2020 2022 2024 2026 2028 2030 2032 2034 2036 2038 2040

Current trends Investment need
Data we relied on

- 350 data series – one for each country/sector combination
- 3 levels of data:
  - High quality
  - Medium quality
  - Other

Examples

<table>
<thead>
<tr>
<th>Quality</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>World Bank Group, OECD, Eurostat</td>
</tr>
<tr>
<td>Medium</td>
<td>Infralatam, other sources</td>
</tr>
<tr>
<td>Other</td>
<td>No suitable data - estimated using econometrics (28% of cases)</td>
</tr>
</tbody>
</table>
Summary of forecasts 2016-2040 inc. SDGs

- Current Trends: $78,782
- Need: $93,653
- Need + SDG: $97,195

$USD billion
Sector outputs

<table>
<thead>
<tr>
<th>Sector</th>
<th>Current Trends</th>
<th>Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rail</td>
<td>$10,211</td>
<td>$11,347</td>
</tr>
<tr>
<td>Road</td>
<td>$25,677</td>
<td>$33,670</td>
</tr>
<tr>
<td>Airport</td>
<td>$2,056</td>
<td>$2,586</td>
</tr>
<tr>
<td>Port</td>
<td>$1,716</td>
<td>$2,272</td>
</tr>
<tr>
<td>Electricity</td>
<td>$25,571</td>
<td>$28,492</td>
</tr>
<tr>
<td>Water</td>
<td>$5,712</td>
<td>$6,425</td>
</tr>
<tr>
<td>Telecoms</td>
<td>$7,838</td>
<td>$8,861</td>
</tr>
</tbody>
</table>

- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
- $1,716
Example of country outputs

https://outlook.gihub.org
InfraCompass
What is it and why?

Guide to creating the best conditions for infrastructure delivery.

Why?

1. Demand to understand how to unlock more investment and delivery quality infrastructure.

2. Brings clarity to the crowded marketplace by identifying the 38 most important indicators for infrastructure (from 138)

“INFRACOMPASS IS A NEW GROUND BREAKING TOOL TO HELP GOVERNMENTS AROUND THE WORLD IMPROVE THE WAY THAT THEY ACCELERATE AND DELIVER THEIR MUCH NEEDED INFRASTRUCTURE INVESTMENT PLANS”

JAMES STEWART
GLOBAL INFRASTRUCTURE CHAIRMAN
KPMG
Reviews country performance across six drivers

Key features include:

• Analyse data on 49 countries
• Compare up to 6 countries at a time
• Pinpoints the practices that lead to strong infra markets
• Identifies priority reforms
• Easy to navigate platform
• Brings together key data in one place
Optimal infrastructure environment

TOP 3 DRIVERS

1. Rule of law, strong governance and trusted institutions
2. Consistent, predictable and transparent regulatory frameworks
3. Transparent & consultative strategic planning, backed up by a pipeline of projects
What emerging economies do well in general?

Planning of infrastructure is relatively strong in Mexico, South Africa and Kenya
What can emerging countries do differently?

**Competition regulation** needs improvement, particularly in Asia.

Latam stands out with some leaders in regulation in Colombia, Peru, and Brazil.
What developed countries do well?

New Zealand, Germany and Canada stand out for their trusted and legitimate Governance and Institutions.
What developed countries could do differently?

Parts of Europe could streamline business and land use procedures.
Try the interactive website – infracompass.github.org
How have organisations used InfraCompass so far?

<table>
<thead>
<tr>
<th>Public Sector</th>
<th>Development Banks/NGOs</th>
<th>Private Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country infra policy agencies have sought assistance on reforms identified in InfraCompass.</td>
<td>MDBs have used InfraCompass to assess market risks and readiness for investment</td>
<td>Investors have used InfraCompass to assess market risks and readiness for infrastructure investment</td>
</tr>
<tr>
<td>Bilateral Aid agencies have used InfraCompass to target aid and technical assistance</td>
<td>MDBs have used InfraCompass to target target aid and technical assistance</td>
<td>Infrastructure advisory using InfraCompass to identify market expansion opportunities</td>
</tr>
<tr>
<td>Trade agencies promoting inwards infrastructure investment opportunities</td>
<td>NGOs are using InfraCompass to contribute to their own indices or country assessment tools</td>
<td></td>
</tr>
<tr>
<td>Trade Agencies using InfraCompass to identify export opportunities</td>
<td></td>
<td></td>
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</tbody>
</table>