



Global **Infrastructure**
Investor Association
Promoting Private Investment in Infrastructure

PCI Days 2022

Tuesday 20th September

About GIIA

- The Global Infrastructure Investor Association (GIIA) is the membership body for 90 of the world's leading investors in infrastructure, and advisors to the sector, who collectively represent over **€1.3 trillion of infrastructure assets under management** across 70 countries.
- The investor member base of GIIA is diverse and ranges from **fund managers, pension funds, insurers and sovereign wealth funds.**
- Our members are investing today to provide the **smart, sustainable and innovative infrastructure** needed for our communities and economies to thrive.



GIA Investor Members



GIIA in the EU



- In the European Union, GIJA members are responsible for **€335 billion** of assets in energy, transport, utilities, social infrastructure and broadband.

Summary

€335bn
AUM

23
countries

566
assets

59
investors

Transport

Airports
41
airports

115m
passengers

Road
128
concessions

4.75m
average daily traffic

Rail
2,462km
track

18,000
stock

Ports and terminals
51
ports and terminals

115m
freight tonnes

Utilities

100m
customers

481,267km
gas pipeline

1.27m km
transmission cable

6,197MW
gas and electricity capacity

Renewables

18,300MW
wind

9,851MW
solar

1,330MW
hydro, energy from waste (EfW) and biomass

Telecommunications

179,000
towers and masts

945,000km
fibre

3.9m sqft
data centers

Social

4,873
hospital beds

622
healthcare centres

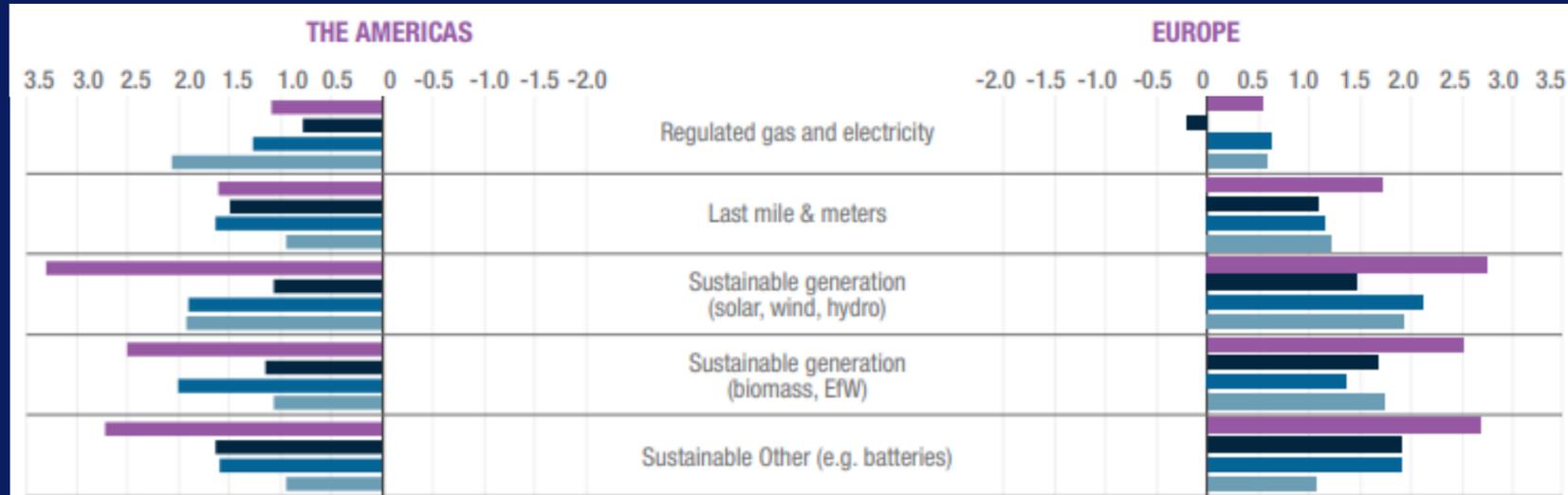
1,057
schools



Investor sentiment



- Opportunities outlook – energy assets (next 12 months)



- Geographic attractiveness / opportunities – all assets (next 12 months)



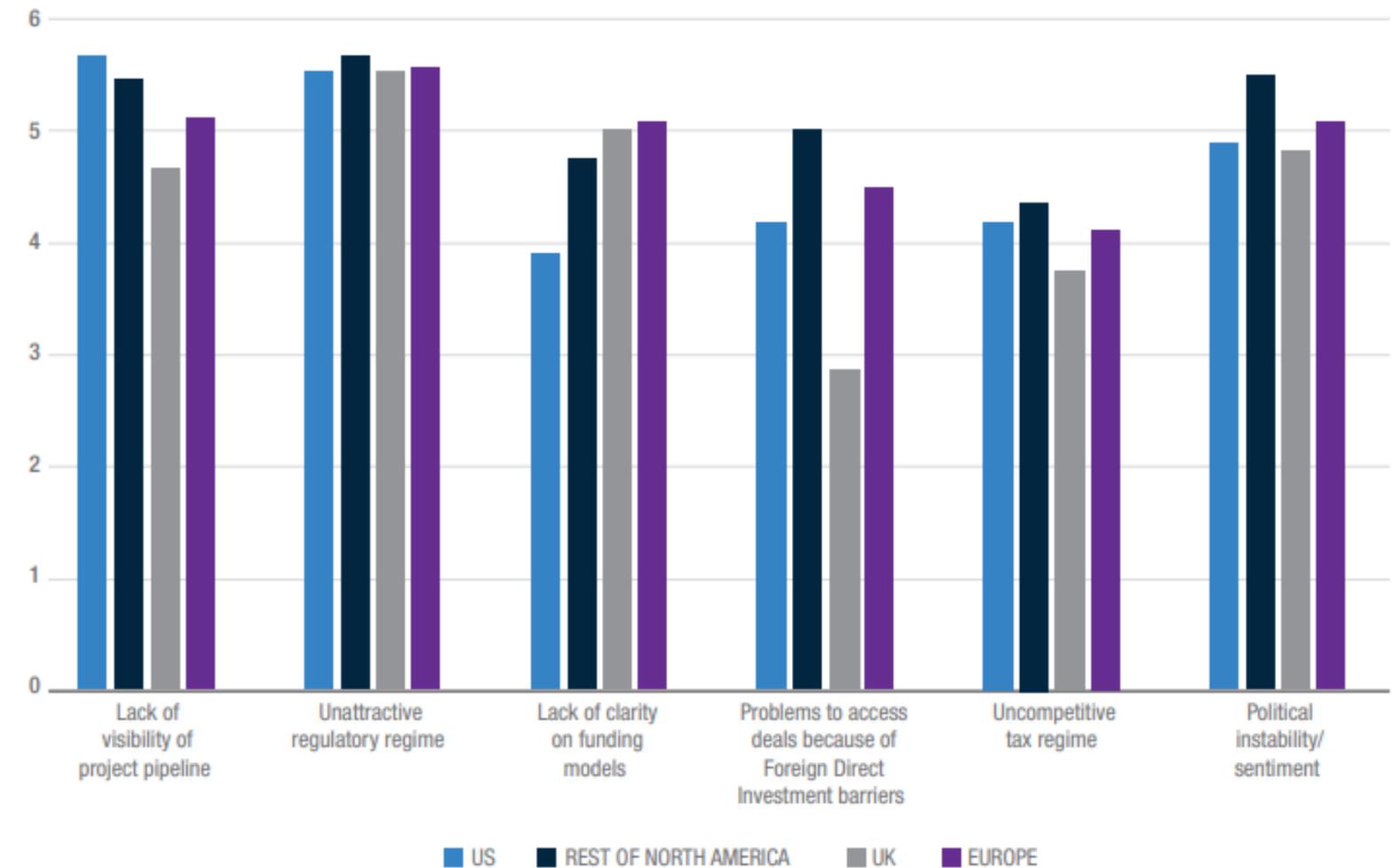
Source
GIIA Infrastructure Pulse Survey Q2 2022

Investor sentiment

- Barriers to investment

Unattractive regulatory regimes are seen as the **highest barrier to investment** for European investors. Respondents attribute this to general **uncertainties over the “future of gas”** and “real concerns around the future development of the regulatory framework across regulated sectors”.

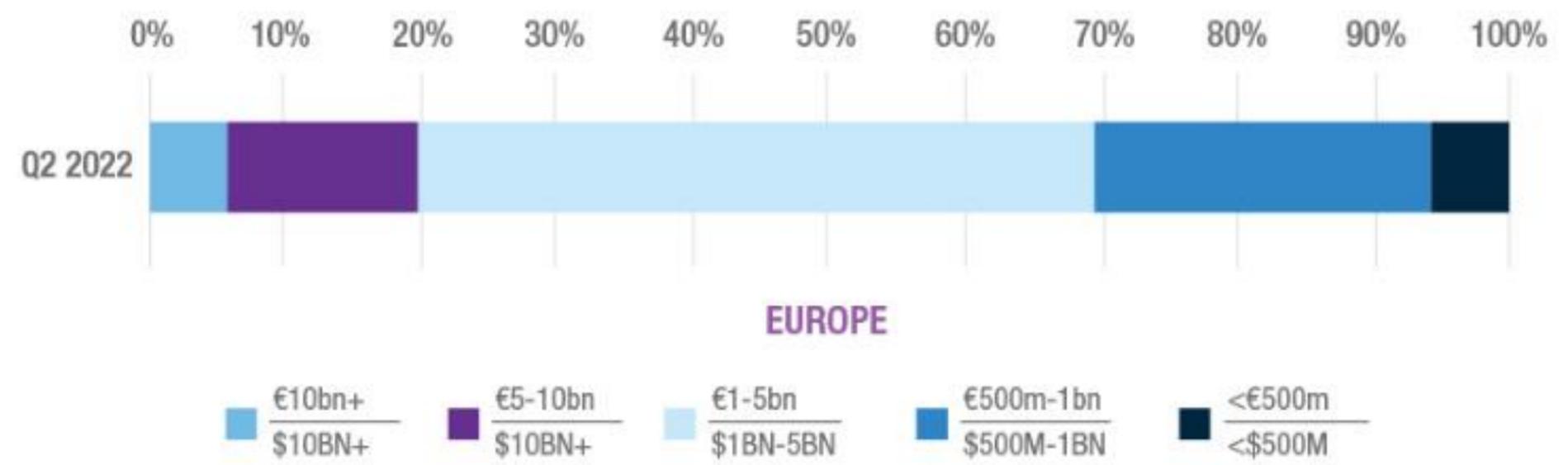
Respondents suggest that **European markets lack the most clarity on funding models and a visible project pipeline** compared to the other regions in the poll.



Pulse Survey – investing to meet net zero goals

20% of respondents plan to invest over €5 billion in European infrastructure over the next five years to meet net zero emissions goals in their investment portfolios.

More than 90% plan to invest more than €500 million.



Respondents placed **i) the regulatory environment ii) a need to create a market framework to stimulate demand, and; iii) climate friendly market incentives** as the things governments should be most focused on to **encourage greater investment in clean energy, transport and digital.**

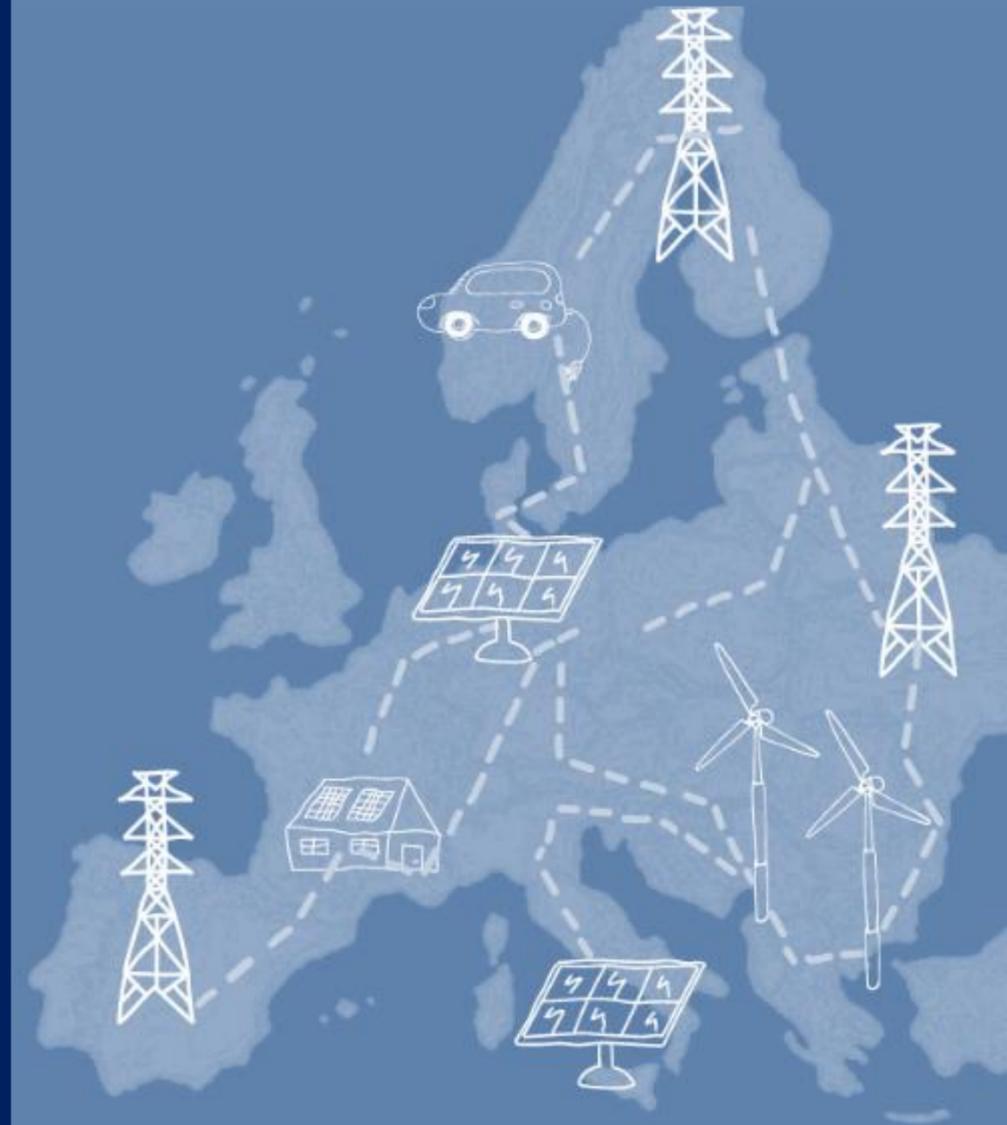
TEN-E focus areas

1. Integrating renewable energy
 - GIIA members hold renewable assets in the majority of EU member states, as well as investments in interconnectors
2. Developing offshore grids
3. Delivering hydrogen and electrolysers
 - GIIA members hold €3.5 billion in hydrogen assets globally

Investor support for PCIs and TEN-E

Some of the benefits private investors like about the PCIs:

- Streamlined permit granting procedures
- ‘One-stop-shop’ national competent authority for coordinating all permit granting procedures
- Eligibility for CEF financing assistance (if / where needed)



Thank you



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