# GIIA global asset database 2019/20 edition

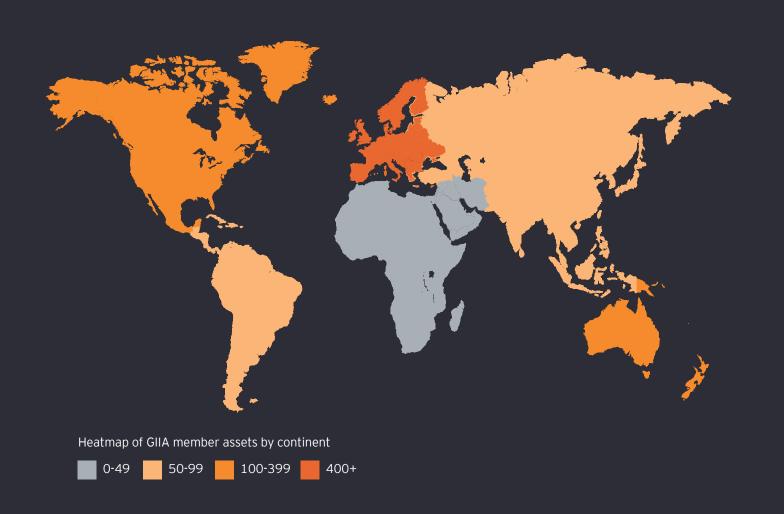
56 infrastructure investors

\$780bn of AUM, invested in

1,500 infrastructure assets, across

55 countries and

6 continents







# GIIA members' assets under management

Summary

56 investor members

\$780bn assets under management

1,500 assets

1,750 stakes held by members

# Utilities

86.3m customers

983,000km gas pipeline

18 assets oil and gas storage

895,000km cable (\*\* 184,000km)

# Transport

# Airports

102 airports

14 countries

(<u></u>1)

1,113m passengers (\$\times\$ 528m)

# Rail

37,700km rail

(<u>^</u> 25,700km)

19,900 units of rolling stock
(A 3,800)

#### Ports

321 ports (**A** 111)

19 countries (A 1)

872m TEU (▲ 222m)

553m tonnes
(▲ 133m)

### Roads

40,400km roads (**A** 1,400km)

# Renewables

18,600mw solar (**v** 2,700mw)

56,100<sub>MW</sub>

wind (<u>^</u> 24,000mw)

12,400mw hydro and biomass (▼ 4,900mw)

Telco

341,000 telco towers (**A** 118,000)

238,000km

fibre

(<u></u> 39,000km)

109 data centres

Social

585

education facilities (A 170)

130,000

students (A 44,500)

870 hospitals (▲ 525)

40,100 hospital beds  $\stackrel{\land}{()}$  10,100)

# GIIA members' assets by key region

Utilities  Water & Gas pipeline Electricity generation 16  Transport  Airports Ports Roads 15 6  Renewable Other  Solar Wind Hydro and biomass 2  Telco Towers Fibre Data centres 3 4 6  Social  Education Healthcare Other  Stakes 214  Elec/Gas generation 16  Rail 6  Other  Other  Oil and Gas Storage 8  Other  Other							
Water & waste 4 waste 4         Gas pipeline 8         Electricity 7         Elec/Gas generation 16           Transport         16         16           Airports 1         Ports 9 Roads 15         Rail 6           Renewable         Other           Solar         Wind Hydro and biomass 2         Traditional generation 4           14         22         2           Towers         Fibre Data centres 6         Storage 8           3         4         6           Social         Other	USA		Assets 186		St	takes 214	
waste 4         8         7         generation 16           Transport           Airports         Ports 9         Roads 6         Rail 6           1         9         15         6           Renewable         Other           Solar         Wind Hydro and biomass 2         Traditional generation 4           14         22         2         Oil and Gas Storage 8           Towers         Fibre Data centres 6         Storage 8         Other           Social         Other         57	Utilities						
Transport           Airports         Ports         Roads         Rail         6           Renewable         Other         Solar         Wind         Hydro and biomass         Traditional generation         4           14         22         2         Oil and Gas         Storage         8           Towers         Fibre         Data centres         8         Other           Social         Other         57	waste		pipeline		У		
Airports         Ports         Roads         Rail           1         9         15         6           Renewable           Other           Solar         Wind         Hydro and biomass         Traditional generation           14         22         2         Oil and Gas           Towers         Fibre centres         Data centres         Storage           3         4         6           Social	4	8		1		16	
1         9         15         6           Renewable         Other           Solar         Wind         Hydro and biomass 2         Traditional generation 4           14         22         2         Oil and Gas Storage 8           Towers         Fibre Data centres 6         Storage 8         Other 5           Social         Other 5         Other 5	Transport						
Renewable         Other           Solar         Wind         Hydro and biomass         Traditional generation           14         22         2         4           Towers         Fibre         Data centres         Storage           3         4         6           Social		1					
Solar         Wind         Hydro and blomass         Traditional generation           14         22         2         Oil and Gas           Towers         Fibre         Data centres         Storage           3         4         6         Other           Social         57	1	9		15		6	
14         22         biomass 2         generation 4           Telco         Oil and Gas Storage 8           3         4         6         Other 57	Renewable					Other	
Telco  Towers Fibre Data centres 8  3 4 6  Social Other 57	Solar	Wind	d		d		
Towers Fibre Data centres 8  3	14	22		2		4	
Towers Fibre Data centres 8 3 4 6  Social Storage 8 Other 57	Telco					Oil and Gas	
3 4 6 Other 57	Towers	Fibre	e			Storage	
Social 57	3	4		6			
	Social						
	Education	Heal	lthcare	Other		J	
		_					

	, ,	_			
UK	Asset	<b>s</b> 518	Stakes 611	EU	
Utilities				Utilities	
Water & waste	Gas pipeline	Electricity	Elec/Gas generation	Water & waste	Gá
12	6	3	2	3	2
Transport		•	<u>'</u>	Transport	
Airports 14	Ports 5	Roads 19	Rail 13	Airports 12	Po 1
Renewable			Other	Renewable	·
Solar	Wind	Hydro and biomass	Traditional generation	Solar	W
40	75	7		35	1
Telco			Oil and Gas	Telco	
Towers	Fibre	Data centres	Storage 1	Towers	Fil
5	10			10	2
Social			Other <b>63</b>	Social	
Education 94	Healthcare 77	Other 72		Education 15	He 2:

	Assets	Assets 411			
Utilities	Utilities				
Water & waste	Gas pipeline	Electricity	Elec/Gas generation		
3	29	11	6		
Transport					
Airports	Ports	Roads	Rail		
12	11	51	16		
Renewable			Other		
Solar	Wind	Hydro and biomass	Traditional generation		
35	142	10			
Telco	Oil and Gas				
Towers	Fibre	Data centres	Storage 10		
10	22	1	l		
Social	Other 50				
Education	Healthcare	Other			
15	23	20			



	Assets 51		stakes 57	
Utilities				
Water & waste	Gas pipeline	Electricity 7		Elec/Gas generation 4
Transport				
Airports	Ports 4	Roads 12		Rail 1
Renewable				Other
Solar 1	Wind 3	Hydro and biomass 3		Traditional generation
Telco				Oil and Gas
Towers	Fibre	Data centres 2		Storage 1
Social				Other 7
Education	Healthcare	Other		

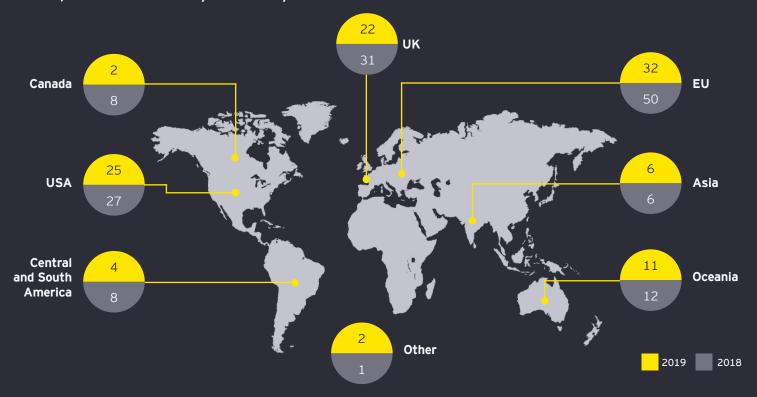
South and Central America

ASId	A55615 04		olakes 72		
Utilities					
Water & waste	Gas pipeline	Electricity	Elec/Gas generation		
9	1		6		
Transport					
Airports	Ports	Roads	Rail		
1	4	18	1		
Renewable			Other		
Solar	Wind	Hydro and biomass	Traditional generation		
13	7	2			
Telco	Oil and Gas				
Towers	Fibre	Data centres	Storage 5		
1		centres			
Social	Other <b>15</b>				
Education	Healthcare	Other			
		1			

Assets	akes 156			
Utilities				
Gas pipeline	Electricity	Elec/Gas generation		
3	6			
Ports	Roads	Rail		
10	7	8		
Renewable				
Wind	Hydro and biomass	Traditional generation		
10	2			
Telco				
Fibre	Data centres	Oil and Gas Storage		
	1	Other		
Social				
Healthcare	Other	13		
7	25			
	Gas pipeline 3 Ports 10 Wind 10 Fibre	3 6  Ports Roads 10 7  Wind Hydro and biomass 10 2  Fibre Data centres 1  Healthcare Other		

# GIIA members' transaction activity

## Acquired stakes by country in 2018 and 2019



Deal flow for GIIA members slowed slightly during the last 12 months with 104 stakes acquired in 2019 (39 fewer than 2018) Investment has primarily reduced across the UK and EU markets, with 54 acquisitions in 2019 compared to 81 in 2018, driven by political and economic uncertainty across the region

New investments in other large regions such as the US were consistent with levels seen in 2018

## Acquired stakes by sector in 2018 and 2019



73% of renewable stakes in 2019 were across Western markets (US, UK and EU)

Compared to 2018, the number of acquisitions in the renewables sector has fallen as Western governments have removed available subsidies and incentive programmes

2018 was a strong year for European gas distribution assets, and as a result 2019 has returned to a more normal level of activity

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