

GIIA global asset database 2020/21 edition

59 infrastructure investors
\$940bn of AUM, invested in
1,700 infrastructure assets, across
66 countries



Heatmap of GIIA member assets by continent



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



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GLIA members' assets under management

Summary

59
investors

▲ 3

\$940bn
assets under
management

▲ \$160bn

1,700
assets

▲ 200

1,950
stakes held
by members

▲ 200

Utilities

89.8m
customers

▲ 3.4m

1,770,000km
gas pipeline

▲ 786,000km

23 assets
oil and gas storage

▲ 5

954,000km
cable

▲ 59,000km

Transport

Airports

77
airports ▼ ▲ 0

13
countries ▼ 1

235m
passengers ▼ 596m

Rail

69,600km
rail ▲ 26,400km

31,100 units
of rolling stock ▲ 11,300

Ports

296 ports ▼ 25

18 countries ▼ 1

101m
TEU ▲ 14m

779m
tonnes ▲ 230m

Roads

51,700km
roads ▲ 4,800km

Renewables

35,700MW
solar
▲ 15,700MW

74,400MW
wind
▲ 13,900MW

20,000MW
hydro, biomass and EfW
▼ 3,600MW

Telco

429,000
telco towers ▲ 191,000

3,000,000km
fibre ▲ 2,000,000km

480
data centres ▲ 50 centres

Social

1,260
education facilities ▲ 680

175,000
students ▲ 45,000

1,450
hospitals/healthcare ▲ 480

62,000
hospital beds ▲ 20,600

GIIA members' assets by key region

USA Assets 253 Stakes 293

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
4	12	9	8
Transport			
Airports	Ports	Roads	Rail
2	13	14	9
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
26	28	7	10
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
4	9	12	6
Social			Other
Education	Healthcare	Other	
			73

UK Assets 503 Stakes 604

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
12	4	3	2
Transport			
Airports	Ports	Roads	Rail
14	4	19	12
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
40	85	8	
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
4	12		1
Social			Other
Education	Healthcare	Other	
96	81	54	51

EU Assets 514 Stakes 579

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
3	30	7	1
Transport			
Airports	Ports	Roads	Rail
10	11	48	21
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
37	157	15	
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
13	31	3	11
Social			Other
Education	Healthcare	Other	
14	24	17	57

Canada Assets 54 Stakes 61

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
1	4		1
Transport			
Airports	Ports	Roads	Rail
2	2	3	2
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
4	6	8	
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
	1		
Social			Other
Education	Healthcare	Other	
	5	3	11



South and Central America

Assets 65 Stakes 72

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
6	4	6	
Transport			
Airports	Ports	Roads	Rail
	4	17	1
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
7	3	3	2
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
		2	
Social			Other
Education	Healthcare	Other	
	1		6

Asia Assets 119 Stakes 129

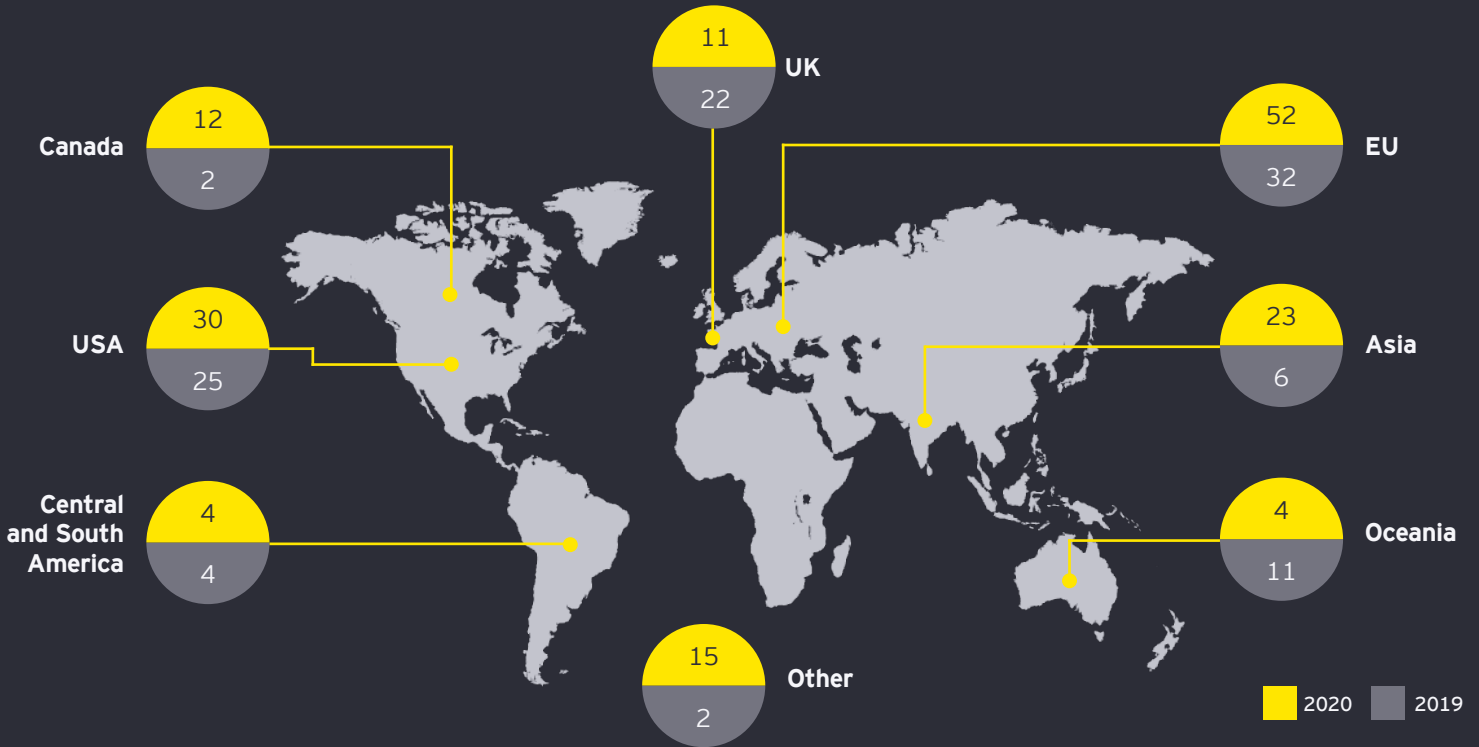
Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
8	2	1	3
Transport			
Airports	Ports	Roads	Rail
	4	25	1
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
25	14	4	2
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
3	2	2	4
Social			Other
Education	Healthcare	Other	
	1	1	14

Oceania Assets 124 Stakes 152

Utilities			
Water & waste	Gas pipeline	Electricity	Elec/Gas generation
7	3	6	
Transport			
Airports	Ports	Roads	Rail
9	11	7	9
Renewable			Other
Solar	Wind	Hydro and biomass	Traditional generation
6	4	2	
Telco			Oil and Gas Storage
Towers	Fibre	Data centres	
5	1	2	
Social			Other
Education	Healthcare	Other	
9	5	22	15

GIIA members' transaction activity

Acquired assets by country in 2019 and 2020

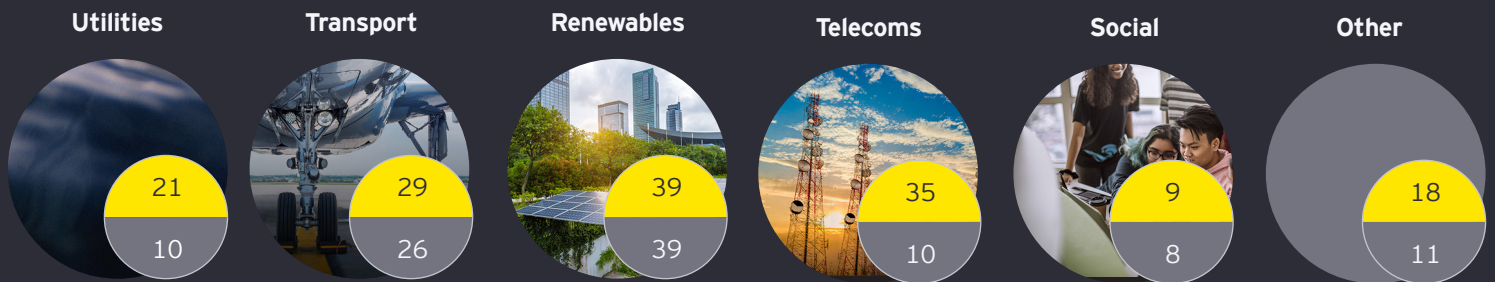


Deal flow for GIIA members increased in 2020 with 151 assets acquired (47 more than 2019)

Investment has reduced in the UK with 11 acquisitions in 2020 compared to 22 in 2019, driven by political and economic uncertainty across the region

There were 87 investments made across Europe, Asia and Canada, 47 more than 2019

Acquired assets by sector in 2019 and 2020



82% of renewable stakes in 2020 were across Western markets (USA, Canada, UK and EU)

There was a significant increase in Telecoms assets, particularly in Fibre with a number of large assets coming to market in 2020 in Asia, the US and EU.

Utilities in 2019 returned to higher levels in 2020 after a lower level of activity in 2019

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