

INFRASTRUCTURE INVESTMENT AND MARKET OPPORTUNITIES IN SOUTHEAST ASIA

Trends, Projects, Opportunities and Outlook



- ❖ Report (PDF)
- ❖ Data-set (Excel)

The report will enable you to:

- ❖ Analyse the prevailing market dynamics, key developments and initiatives in light of the Covid-19 outbreak
- ❖ Realistically analyse the upcoming opportunities and the top projects across infrastructure sectors in the region
- ❖ Gain insights into the outlook for the region and the impact of Covid-19 on ongoing, under bidding and announced projects.
- ❖ Assess the investment scenario in the region, the risks and the expected returns
- ❖ Identify emerging growth avenues
- ❖ Access comprehensive information and analysis to support business strategy and decision making

Southeast Asia's infrastructure growth story has witnessed modest growth and is expected to offer huge business opportunities in the years to come. Investors perceive the region as an attractive destination due to its sustained growth rates, growing consumer markets, strong labour force, and steady economic and regional integration among its 10 nations. The improvements in the overall business environment have brightened SEA's prospect of attracting investments. Public-private partnership mode of projects implementation is also being explored to establish businesses and channel funds in the region's infrastructure space. While Covid-19 had led to disruptions in project delivery, raw material availability, labour supply, capacity addition and investments, activity has started to resume normalcy with the phased lifting of lockdowns across countries. As growth picks up gradually in the post-Covid world, the region will continue to offer substantial opportunities in sector such as roads, railways, urban transport, electricity, renewables, and oil and gas.

Summary and Insights

SECTION I: MARKET OVERVIEW, TRENDS AND COVID-19 IMPACT ASSESSMENT

1. Infrastructure Snapshot

- ❖ Size and Growth
- ❖ Infrastructure Deficit
- ❖ Growth Drivers
- ❖ Emerging Trends
- ❖ Key Sectoral Trends
- ❖ Recent Policy Changes and Government Initiatives
- ❖ Growth Drivers
- ❖ Investment Projections
- ❖ Fiscal and Monetary Response
- ❖ Key Mitigation Strategies
- ❖ Risks and Challenges
- ❖ Outlook and Opportunities (till 2025)

2. Impact of Covid-19 on Projects, Construction and Investments

- ❖ Expected Time and Cost Overruns (Short Term and Medium Term)
 - Ongoing/Under Construction Projects
 - Under Bidding Projects
 - New Project Announcements
- ❖ Impact on Project Delivery
 - Raw Material, Input Costs and Equipment Availability
 - Construction output
 - Labour Supply
 - Supply Chain
- ❖ Impact on FDI Investments
- ❖ Impact on Other Funding Sources
- ❖ Response of Countries
- ❖ Impact on Trade Partnerships
- ❖ Capacity and Investment Outlook

3. Project Pipeline Analysis: Re-assessment of Opportunities in Light of Covid-19 (Till 2025)

- ❖ Assessment of Project Pipeline:
 - Short Term
 - Medium Term
 - Long Term
- ❖ Analysis by Sector
- ❖ Analysis by Country
- ❖ Analysis by Stage of Development
- ❖ Analysis by Ownership
- ❖ Analysis by Country
- ❖ Analysis by Investment
- ❖ Top Upcoming Projects in Terms of Investment
- ❖ Projects Awaiting Clearances/Land Acquisition/Financial Closure
- ❖ Big-ticket Opportunities to Look Out For

4. Market Opportunities and Future Outlook

- ❖ Economic Outlook and Growth Forecasts (Short term and long term)
- ❖ Capacity Addition Plans and Projections
- ❖ Sector-wise Capacity and Investment Targets
- ❖ Planned Capacity Additions
- ❖ Proposed Investments
- ❖ Market Opportunities
 - Project Developers
 - EPC Contractors
 - Financiers
 - Equipment Providers
 - Construction Material Suppliers
 - Consultants

5. Investment and Financing Trends

- ❖ Infrastructure Spending
- ❖ Investment Laws and Promotion Agencies

❖ Trends in Funding Sources (Past five Years)

- Government Funding
- Multilateral Funding
- Bilateral Funding
- Bank Lending
- Bond Financing
- Private Equity
- Others

❖ FDI Trends and Impact of Covid-19

❖ New and Emerging Sources of Finance

❖ Issues and Challenges

❖ Risks and Historical Rates of Return

❖ Investment Outlook in the Post-Covid World

6. Private Sector Participation: Experience, Challenges and Opportunities

- ❖ Current Scenario
- ❖ Business Models
- ❖ Sector-wise Private Investments
- ❖ Key Completed PPP Projects
- ❖ Key Upcoming PPP Projects
- ❖ Key Risks and Challenges
- ❖ Impact of Covid-19 on Developer Revenues
- ❖ Upcoming Opportunities
- ❖ Short, Medium and Long-term Outlook

7. EPC Market: Experience and Opportunities

- ❖ Current Scenario
- ❖ Key Players (Domestic and Foreign)
- ❖ Key Contracts
- ❖ Foreign Players
- ❖ Sector-wise Experience
- ❖ Impact of Covid-19
 - Key Construction Contractors
 - Material Supplies
 - Order Inflows
- ❖ Issues and Challenges
- ❖ Market Opportunities
- ❖ Short, Medium and Long-term Outlook

SECTION II: SECTOR-WISE ANALYSIS, DEVELOPMENTS AND OPPORTUNITIES**8. Regional Infrastructure**

- ❖ ASEAN Economic Community
- ❖ Master Plan on ASEAN Connectivity 2025

❖ ASEAN Single Window

❖ ASEAN Highway Network

❖ ASEAN Smart Cities Network

❖ ASEAN Single Aviation Market

❖ ASEAN Single Shipping Market

❖ ASEAN Power Grid and Asian Super Grid

❖ ASEAN Broadband Corridor

❖ China's Belt Road Initiative (BRI)

❖ Key Upcoming Cross-border Projects under MPAC 2025

❖ Proposed Investments

9. Conventional Electricity Generation

❖ Size and Growth

❖ Emerging Trends and Developments

❖ Impact of Covid-19 on Project Timelines, New Bids and Financing

❖ Costs and Tariffs

❖ Key Projects (Completed and Ongoing)

❖ Top Upcoming Projects

❖ Proposed Investments & Capacity Addition Targets

❖ Technology Advancements

❖ Market Opportunities

❖ Issues and Challenges

❖ Future Outlook and Demand Projections

10. Renewable Electricity Generation

❖ Size and Growth

❖ Emerging Trends and Developments

❖ Impact of Covid-19 on Project Timelines, New Bids and Financing

❖ Costs and Tariffs

❖ Key Projects (Completed and Ongoing)

❖ Top Upcoming Projects

❖ Proposed Investments & Capacity Addition Targets

❖ Technology Advancements

❖ Market Opportunities

❖ Issues and Challenges

❖ Future Outlook and Demand Projections

11. Transmission, Distribution and Smart Grid Infrastructure

❖ Size and Growth

- Transmission Network

- Distribution Network

- Smart Grid Network

- ❖ Smart Grid and Metering Initiatives
- ❖ Emerging Trends and Developments
- ❖ Recent Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Technology Advancements (AT&C Loss Reduction, Energy Storage, Transmission Technology & Automation)
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

12. Oil and Gas: E&P, LNG and Pipeline infrastructure, Refinery and Petrochemicals

- ❖ Size and Growth
 - E&P Scenario
 - LNG Infrastructure
 - Pipeline Connectivity
 - Refinery and Petrochemicals
- ❖ Emerging Trends and Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Pricing Trends
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Technology Advancements (Asset Monitoring and Pipeline Integrity & Safety)
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

13. Roads

- ❖ Size and Growth
 - Highways
 - Expressways
 - Tunnels & Bridges
- ❖ Emerging Trends and Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects

- ❖ Technology Advancements (Tolling, Construction and O&M)
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

14. Railways

- ❖ Size and Growth
 - Passenger
 - Freight
- ❖ Emerging Trends and Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Technology Advancements
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

15. Urban Transport

- ❖ Size and Growth
 - Metro Rail
 - Light Rail
 - Bus Transit
 - Others
- ❖ Clean Bus Market
 - Experience So Far
 - Operational Fleet
 - Procurement Plans
- ❖ Emerging Trends and Developments
- ❖ Recent Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Technology Advancements (Rolling Stock, Fare Collection and S&T)
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

16. Seaports

- ❖ Size and Growth
- ❖ Emerging Trends and Developments
- ❖ Recent Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Technology Advancements (Mechanisation and Modernisation)
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

17. Airports

- ❖ Size and Growth
 - Passenger
 - Cargo
- ❖ Emerging Trends
- ❖ Recent Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Technology Advancements (Passenger Facilitation and Cargo Handling)
- ❖ Tariff Trends
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects
- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

18. Water and Waste

- ❖ Size and Growth
 - Water Supply
 - Waste Generation
 - Treatment Capacity
 - Desalination Capacity
- ❖ Emerging Trends
- ❖ Recent Developments
- ❖ Impact of Covid-19 on Project Timelines, New Bids and Financing
- ❖ Technology Advancements (Treatment, Metering & Loss Reduction and Asset Management)
- ❖ Costs and Tariffs
- ❖ Key Projects (Completed and Ongoing)
- ❖ Top Upcoming Projects

- ❖ Proposed Investments & Capacity Addition Targets
- ❖ Market Opportunities
- ❖ Issues and Challenges
- ❖ Sector Outlook

SECTION III: COUNTRY PROFILES

- ❖ Brunei
- ❖ Cambodia
- ❖ Indonesia
- ❖ Lao PDR
- ❖ Malaysia
- ❖ Myanmar
- ❖ Philippines
- ❖ Singapore
- ❖ Thailand
- ❖ Timor-Leste
- ❖ Vietnam

Each country profile will cover the current economic scenario, current state of infrastructure, sector-wise size and growth, trends in budgetary allocations, mitigation strategies and relief measures to deal with the impact of Covid-19, expected capacity additions, proposed investments, and a snapshot of key completed and upcoming projects.

SECTION IV: DATABASE OF KEY PROJECTS

The database will have information on project scope, cost, capacity, location, implementing agency, ownership, EPC contractor/developer, equipment provider, current status, date of commencement of construction/month of award, and expected date of completion

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