

INFRASTRUCTURE INVESTMENT AND MARKET OPPORTUNITIES IN SOUTHEAST ASIA

Trends, Projects, Opportunities and Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)



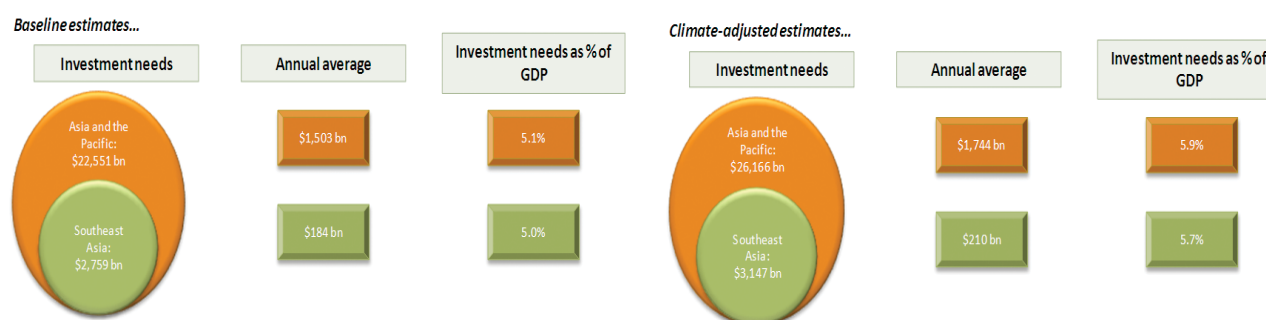
The report will enable you to:

- ❖ Market dynamics, key developments and initiatives in light of the Covid-19 outbreak
- ❖ Investment scenario in the Southeast Asian region, the risks and expected returns
- ❖ Outlook in the region and impact of Covid-19 on ongoing, under bidding and announced projects
- ❖ Upcoming opportunities and top projects across infrastructure sectors in Southeast Asia

Report Summary and Key Insights

- While infrastructure has been an important priority area for the Southeast Asian economies, the pandemic outbreak will certainly blur this focus. Prioritising health and employment will be the key goal for most emerging economies. Covid-19 has led to disruptions in project delivery, raw material availability, labour supply, capacity addition and investments. However, activity has started to resume normalcy with the phased lifting of lockdowns across countries.
- Overall, growth in ASEAN countries is expected to pick up pace over the medium-term owing to a strong rebound in trade, robust domestic demand and infrastructure development initiatives undertaken by various governments. SEA's growth is expected to remain strong at 5.2% between 2019 and 2023.
- While PPP has an increasing role in infrastructure development, there has not been much change over the last decade in terms of its real contribution to overall infrastructure investment in Southeast Asia. A total of 770 infrastructure deals have been made between 1990 and 2019 in Southeast Asia. These deals were able to garner a total investment of ~USD 231 billion.
- COVID-19 has significantly disrupted the private equity (PE) industry in Southeast Asia. PE and venture capital (VC) investment activity across Southeast Asia was off to a slow start in Q1 2020. During that period, PE and VC firms invested over \$1.4 billion in 141 deals throughout the region, according to an EY report. Hampered by the COVID-19 crisis, the aggregate investment value and volume fell by 65% and 9% respectively year-on-year.
- World Bank, ADB and AIIB are stepping up, putting in place emergency financing measures, debt relief, funding to strengthen health services and primary healthcare, and expanded trade finance.

Infrastructure Investment Needs during 2016-30 (\$ billion in 2015 prices)



Source: Asian Development Bank

- With the onset of Covid-19, many logistics companies are adopting technologies including artificial intelligence (AI), IoT, and robotics to enhance efficiencies in their transport system and build more resilient supply chains. Brunei government announced the Digital Economy Masterplan 2025 in June 2020 to provide its citizens with the right digital environment and infrastructure. In Singapore's smart nation initiative entitled "Smart Mobility 2030", Singapore is running trials of autonomous vehicles and buses. Vietnam visualised four potential digital futures and will transit into a digital economy by 2030, while growing sustainably and improving business competitiveness and productivity. Technologies are also being leveraged to develop smart digital solutions to ensure smart city advancements and urban transformation in Bandung, Indonesia.
- Construction activity is expected to remain slow at least in the short-run, as the Southeast Asian countries face the ravages of the ongoing COVID-19 pandemic.
- While issues pertaining to raw material, equipment and labour availability might tide off soon when the disease spread is controlled, funding of new infrastructure projects might continue to pose challenges even in the post-pandemic time.
- For PPPs to take off across Southeast Asia, decision makers should focus on offering a few well-prepared PPP projects that can deliver demonstration effects. Across the region, the capacity of national and sub-national government agencies dealing with PPPs need to be improved, and multinational development banks can help client governments build this capacity.
- Despite concerns of a slowdown triggered by issues such as the US-China trade war and the Covid-19 pandemic, Southeast Asia will continue to offer attractive long-term project finance opportunities for years to come.

SUMMARY AND INSIGHTS

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

1. Infrastructure Snapshot

- ❖ Size and Growth
- ❖ Current State of Infrastructure and Infrastructure Deficit
- ❖ Growth Drivers
- ❖ Emerging Trends
- ❖ Key Sectoral Trends
- ❖ Recent Policy Changes and Government Initiatives
- ❖ Fiscal and Monetary Response
- ❖ Mitigation Strategies
- ❖ Policy Changes and Government Initiatives
- ❖ Issues and Challenges
- ❖ Investment Projections
- ❖ Sector wise Proposed Investment and Opportunities
- ❖ Future Outlook

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
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 - Supply Chain
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 - Multilateral Funding
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 - SWFs and Pension Funds
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3. Project Pipeline Analysis

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 - Medium Term
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- ❖ Analysis by Sector
- ❖ Analysis by Stage of Development
- ❖ Analysis by Ownership
- ❖ Analysis by Country
- ❖ Analysis by Investment
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- ❖ Big-ticket Opportunities to Look Out For

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- ❖ Country-wise Planned Capacity Addition and Proposed Investment
- ❖ Sector-wise Planned Capacity Addition and Proposed Investment
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 - Financiers
 - Equipment Providers
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 - Consultants
- ❖ Future Outlook

5. Investment and Financing Trends

- ❖ Infrastructure Spending
- ❖ Investment Laws and Promotion Agencies
- ❖ Trends in Funding Sources (Past five Years)
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 - Bilateral Funding
 - Bank Lending
 - Bond Financing
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- ❖ Risks and Historical Rates of Return
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6. Private Sector Participation: Experience, Challenges and Opportunities

- ❖ Current Scenario
- ❖ Business Models
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- ❖ Key Upcoming PPP Projects
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- ❖ Short, Medium and Long-term Outlook

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- ❖ Key Contracts
- ❖ Sector-wise Experience
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- ❖ ASEAN Power Grid and Asian Super Grid
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- ❖ Proposed Investments

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SECTION III: COUNTRY PROFILES

19. Country Profiles

- ❖ Brunei
- ❖ Cambodia
- ❖ Indonesia
- ❖ Lao PDR
- ❖ Malaysia
- ❖ Myanmar
- ❖ The 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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