



Emerging Trends in Infrastructure 2018

January 2018

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Trend 1: The clash of competing forces

- Policy-makers and politicians will need to focus on building bridges and balancing the needs of all stakeholders.
- The big challenge is creating a shared future by making smart infrastructure investment decisions.



Trend 2: Infrastructure planners start to think about flexibility

- We hope to see infrastructure planners and developers design and contract infrastructure projects that could support a range of possible futures.



Trend 3: Sustainability - in all its forms - rises up the agenda

- More than just environmental considerations.
- Infrastructure planners, owners and developers start taking a more robust approach to sustainability, creating more value from their investments.



Trend 4: The pace of development comes under the microscope

- Vital that decision-makers find renewed urgency in their approach to infrastructure.
- A more holistic view of the wider benefits an investment in infrastructure is trying to achieve.



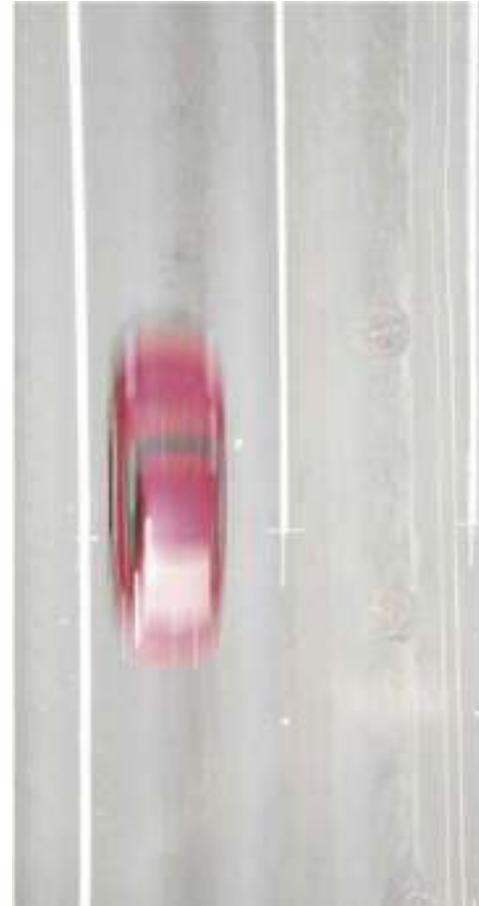
Trend 5: Security becomes critical

- Both cyber attacks and the physical threat are a concern.
- We need to change the way we improve the security of existing infrastructure.
- Security concerns will change the way we plan and spend on our investments.



Trend 6: Traditional roles become less clear

- Shifting delivery and ownership to the private sector does not remove governments' wider responsibilities.
- Tough choices need to be made to balance public service delivery with private participation.



Trend 7: Creating alignment between payers, financiers and beneficiaries

- Governments need to think more about the balance between who pays and who benefits from infrastructure development.
- We need a clearer understanding of the full value of infrastructure.



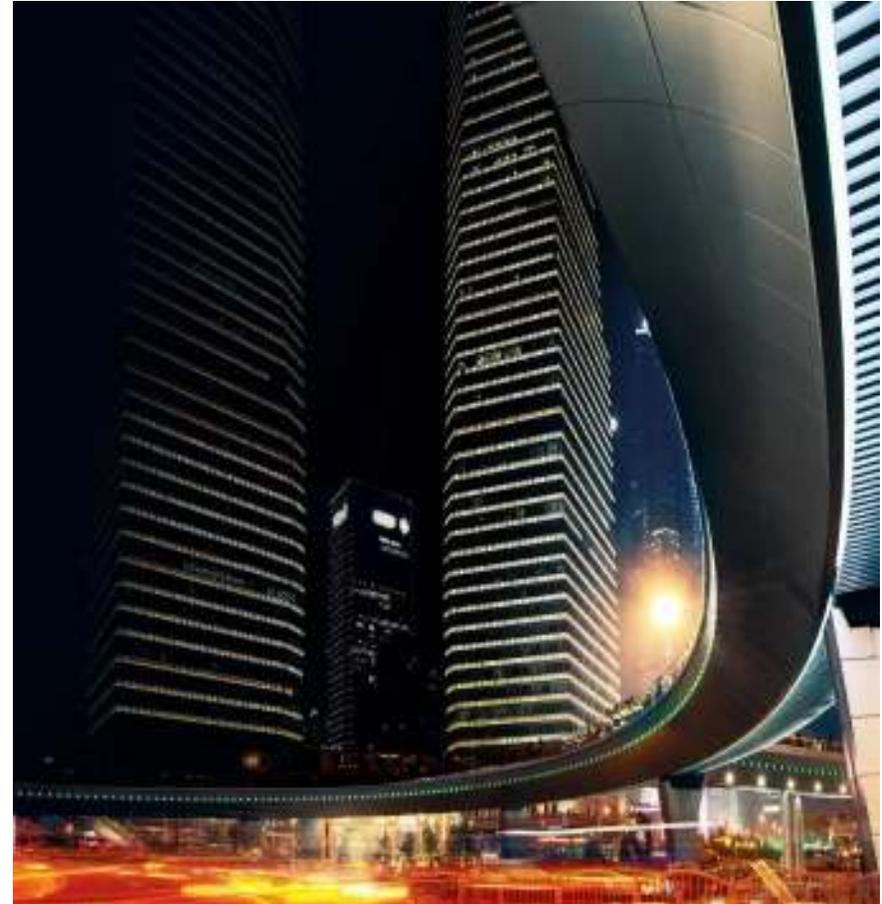
Trend 8: Pricing models mature

- The availability of real-time data, computing power and more sophisticated algorithms means companies can calibrate their prices more carefully.
- A new emphasis on understanding the need, value and ethics of dynamic pricing.



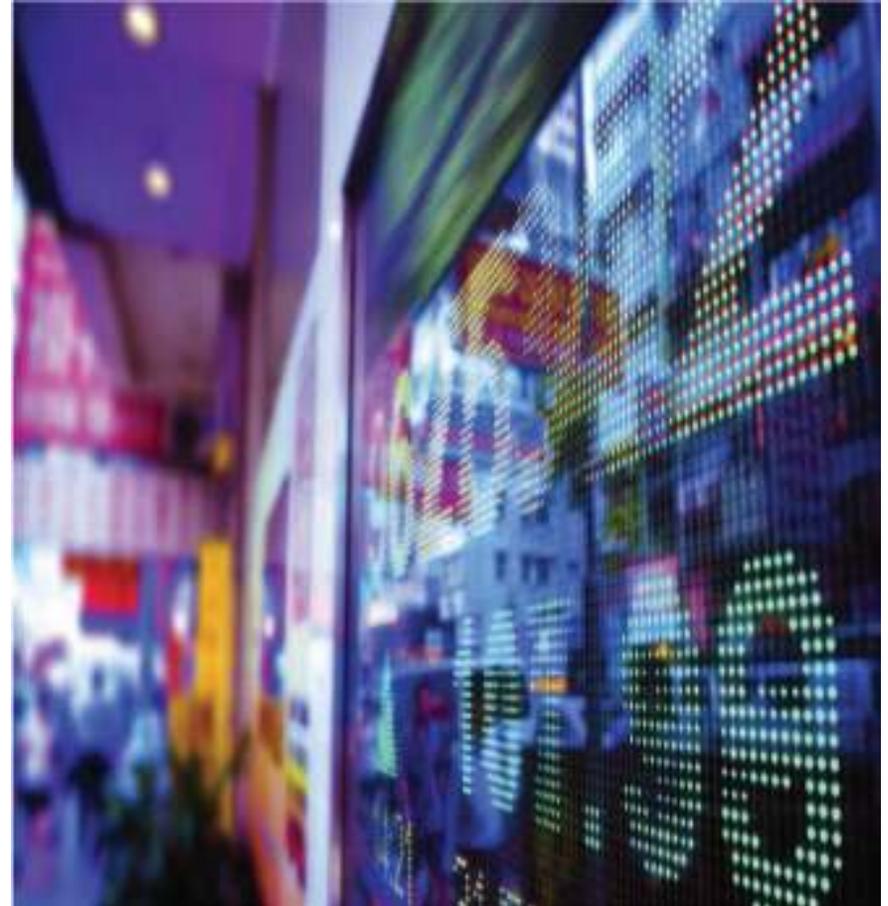
Trend 9: The benefits of sharing data become more evident

- The benefits of data sharing are obvious but constrained by mixed views on who owns what data and how it can be used.
- High quality data curation will be key to creating value potential.



Trend 10: Alternative asset classes re-converge

- The lines between various asset classes will blur an expansion in the pools of equity that will target the infrastructure sector.
- Private equity will move into a wider range of assets across a wider variety of markets.





Thank you



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