



Sub-Regional Expert Group Meeting (EGM)  
for South-East Asian Countries

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# *Financing Sources for Public-Private Partnerships (PPPs)*

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1. Are PPPs needed?
2. Track record and current initiatives
3. Financing sources
4. Conclusions



# Infrastructure under pressure

## Booming demand for infrastructure services

- **Electricity generation** has risen by **4.5 times** since 1990 and is expected to grow by 4.2% per year on average till 2035



Source: South-East Asia Energy Outlook (IEA-ERIA)

- **Urban population growth** in South-East Asia: **100,000 people / week**



congestion costs **2-5%** of Asian GDP

- **Ports:** flow of containers **x3** since 2000



(Indonesia, Malaysia, Philippines, Thailand and Viet Nam / source: WBI)

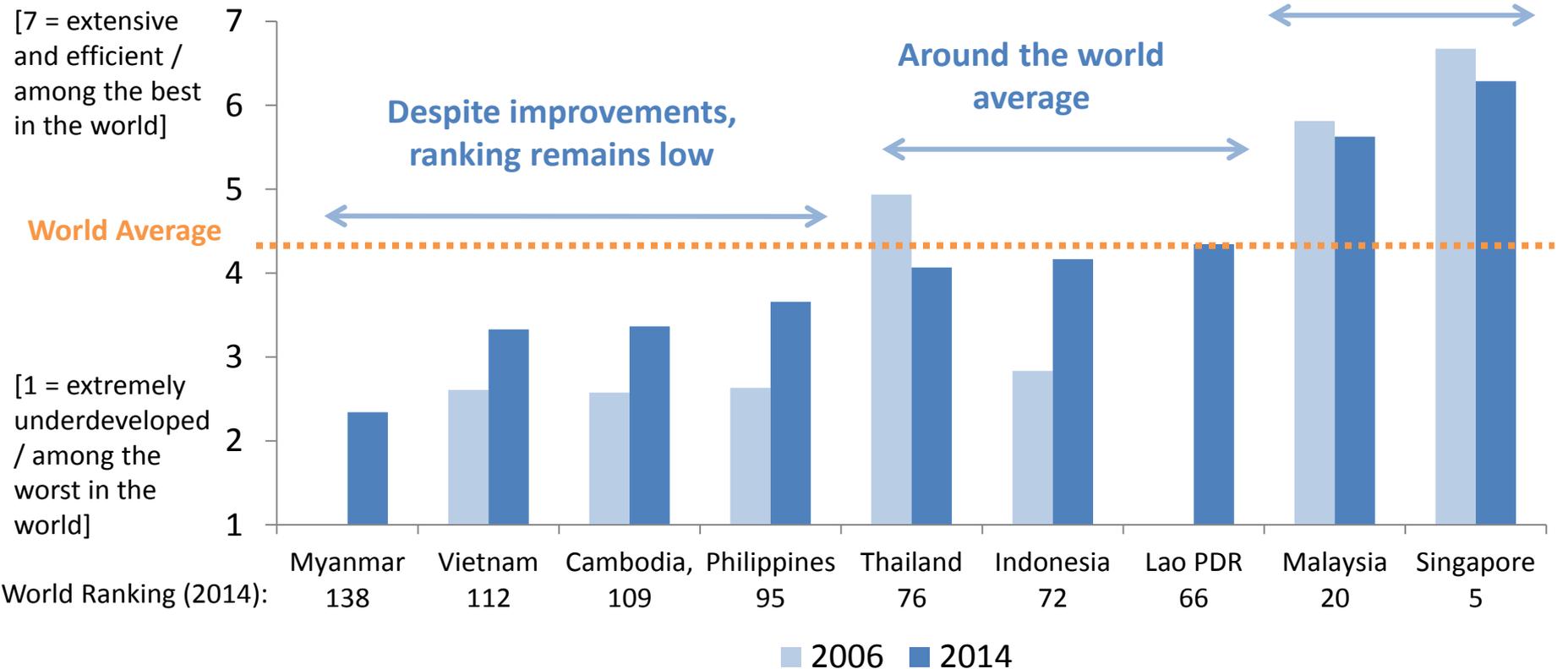


- **Airport:** Passengers **x2.5** in South-East Asia since 2005  
some countries by 4 (e.g. Lao PDR and Cambodia)

# The quality of infrastructure

## Current Perception

How would you assess general infrastructure  
(e.g., transport, telephony, and energy) in your country?

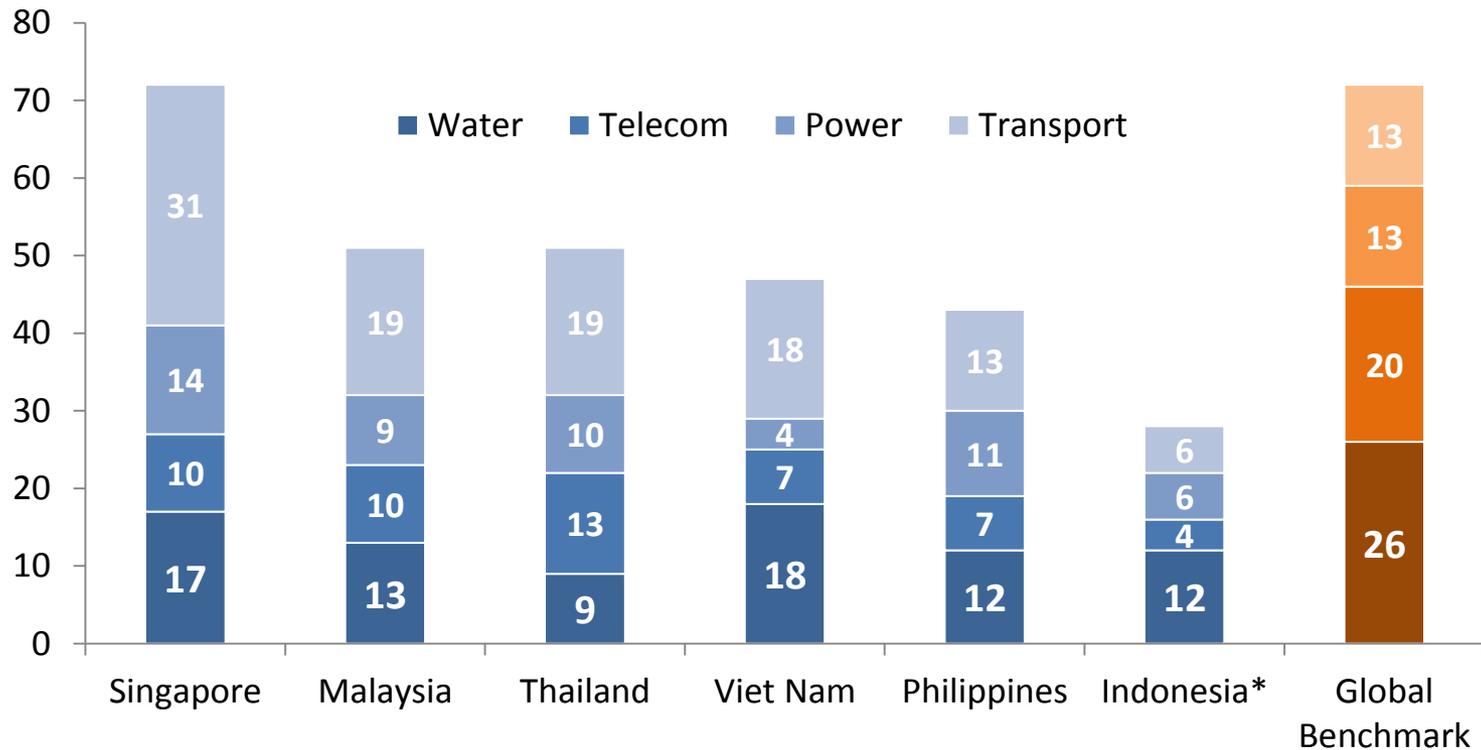


Source: World Economic Forum (global-competitiveness-report-2014-2015)

# Infrastructure stock...

*...below developed countries benchmark*

Infrastructure Stock (% of GDP, 2012)  
(source McKinsey Global Institute)



\*Transport infrastructure for Indonesia is underestimated, as expenditure for rail, ports and airports is not available

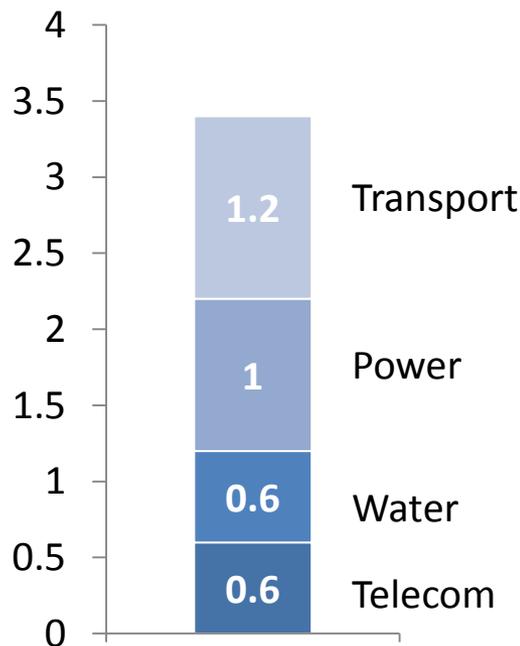
# Huge investments needed

*... to reach world-class infrastructure*

Investment needs in South-East Asia (2014-2030)

(source McKinsey Global Institute)

\$ trillion



Estimates > **\$ 200 billion**

per year for South-East Asian region

**2 to 6 times** annual amount spent historically in these countries

**Public Sector unlikely to cover all the needs**





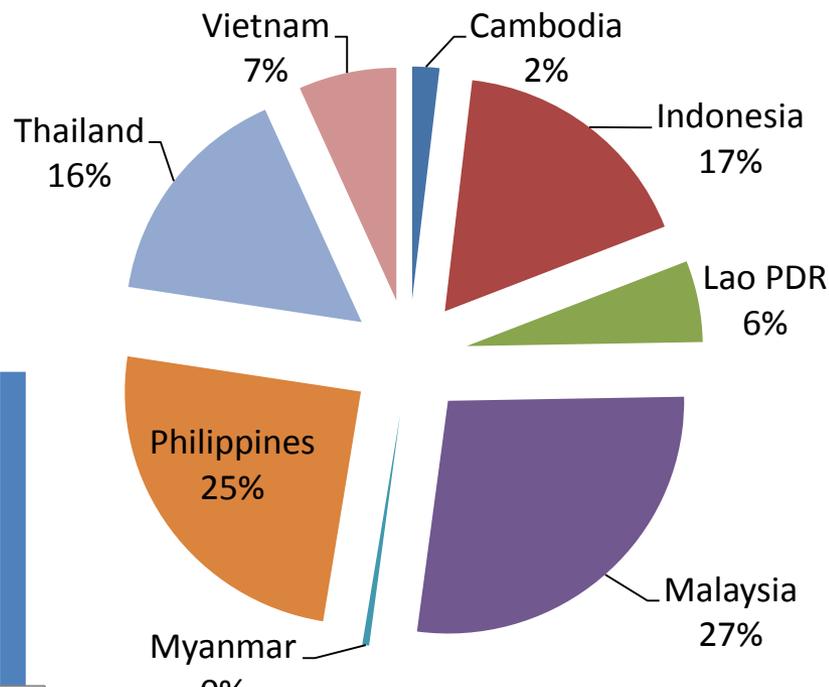
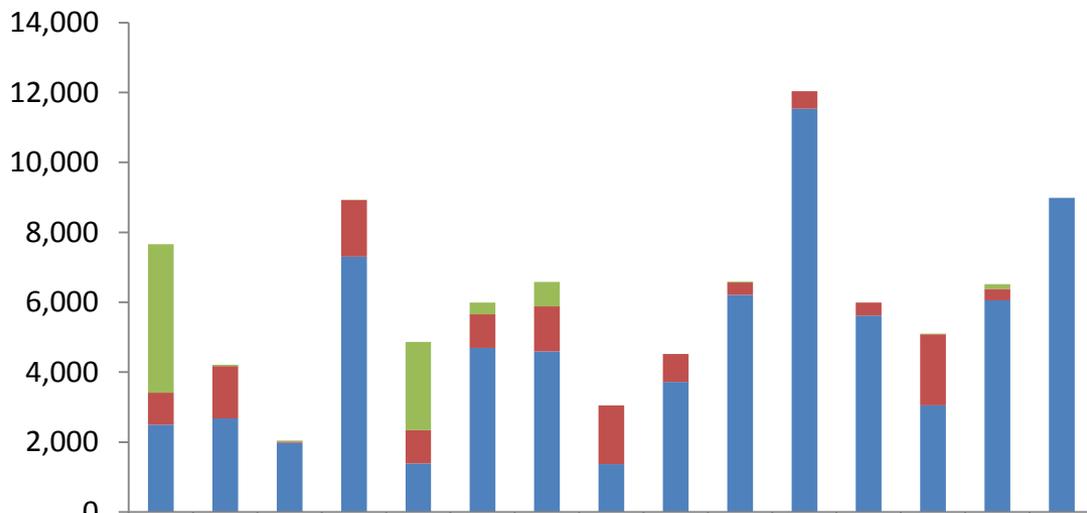
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# Private Participation in Infrastructure...

... in South-East Asia

- Around \$10 billion per year
- Largely in the energy sector (75%)



预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=5\\_3803](https://www.yunbaogao.cn/report/index/report?reportId=5_3803)

