The CV 19 Crisis • April 9th-12th, 2020
There are a couple of reasons behind our surveys:

- To give the infrastructure community’s ideas and expertise a strong voice
- To provide an assessment, and action recommendations, to leadership
- And, given our strong U.S. and Global footprints, to show the global necessities that are aligned with U.S. recovery
The U.S. Infrastructure community has a real opportunity to build a strong brand - 92% of respondents see the brand as average (51%) or weak (40%).

There is no specific area that needs to be addressed - all sectors require investment, although clean water heads the list, followed by transit and highways.

There is an argument for creating new institutions to identify, execute and manage on an infrastructure plan.

Governors are seen as the key infrastructure decision-makers by 53% of those surveyed (with the federal government in distant second place at 27%).

Politics is the villain of the story, with 62% of respondents seeing the political system as the hold up.
If infrastructure is to be a driver of recovery, then the most troubling result is how weak the brand is viewed in the U.S.

- Only 9% of respondents say that Infrastructure is a strong brand (like Nike, Apple, etc.)

- 40% say it is a weak brand (characterized by incompetence, corruption)

- 51% say it is an average brand in their countries (providing services, but with occasional problems)

If a recovery were to be based on infrastructure investment, then this is a critical weakness.

91% See Infrastructure as a Weak or Average Brand
BRAND COMMENTS

Explanations of the poor impression are a miss mash:

- The most visible "brands" are surface and air transportation, both of which cause the most frustration. Electric, water and sewer, and even internet are generally unsung heroes but out of sight, out of mind.

- Years of under funding have left the public with a bad impression.

- US infrastructure is commonly perceived as failing, with grade of D or worse. As we rebuild our infrastructure brand, we need go from antiquated infrastructure to smart infrastructure.

- I think the US infrastructure brand is weak. Our country's infrastructure is aging and in desperate need of modernization.

- Infrastructure projects are pathologically over cost, over schedule, and subjects of fraud, waste, and abuse. Moreover, successful infrastructure projects nowadays seem to have a recurring cost - tolls, variable fees, etc. that never go away.

- We don't invest, and there are few signs this will change.

- There is a prevailing notion among the general public that our infrastructure is broken and crumbling, adding to a sense of overall decay of the American political system and institutions.
“We don't do a very good job promoting ourselves. This needs to change dramatically in the future”
“There is no unified brand for US infrastructure; too many fragmented voices; we need to speak with one, unified voice.”
Nothing stands out as the most important necessity… everything needs to be addressed, but significant controversy over large v small, new v O&M, and old versus digital

Clean Water is a surprise winner, listed in the top 3 by 64% of respondents.

Transit is listed as a #1 priority by 28% of respondents, and listed in the top 3 by 52%.

Highways were listed as top priories by 29% of respondents, and in terms of top 3 highways were selected by 51%.

No other area of infrastructure reached 10% as a #1 priority, including hospitals and schools (8%), wastewater (7%) and electricity (7%)

The “other” category included broadband as well as dams and levees.

And then there is the issue of actually ranking sectors, and projects!
Everything is a priority...

All segments have significant needs so any investment would be a huge positive.

I think the rankings should be based on repair and replacement before new. Then public health. Then on who has the ability to raise their own revenue to match the investments.

Hospitals are much more important now than schools in terms of urgency, though the two are combined here.

Airports, Water, Transit- all grossly under-invested and mismanaged

We need to dramatically improve our utility grid to increase resiliency, reliability, and include more energy storage, particularly using hydrogen electrolysis in concert with renewables to increase utilization.

It's not simply about prioritizing certain sectors but looking at the value of the particular project within a sector also.
“This is a good time to support large public transport projects that would otherwise not start due to lack of funding.”
“Major investments in 5G and technology advances are critical to every infrastructure asset to make them exponentially more efficient and effective.”
WHAT IS HOLDING UP A SIGNIFICANT INFRASTRUCTURE INITIATIVE

- 62% see “Politics” as the biggest reason for the lack of an infrastructure initiative
  - All, infrastructure is not sexy. Political needs only dictate we are reactive rather than proactive.
  - Politicians at every level still want to fund infrastructure projects the way they have done for decades and its failing all Americans and industries.
  - Neither side wants to be perceived as giving a win to the other side. Also, infrastructure delivery duration can be longer than the term of an elected official. Term limits could help both these problems.
- 28% highlighted a lack of appreciation for the importance of infrastructure to our economy
  - No one thinks about what is buried in the ground and no one cares what happens when they flush their toilets until they can’t flush them anymore!
“Washington is broken. Too partisan even for infrastructure.”
DOES THE U.S. NEED A SPECIALIZED AGENCY TO OVERSEE INFRASTRUCTURE - PROJECTS, MANAGEMENT

• Essentially a 50/50 tie, with 42% of respondents commenting

  • ABSOLUTELY...an independent, non/political entity who will oversee the procurement processes from A to Z and that jobs will be assigned by merits and NOT by friendship and/or political affiliation

  • The government doesn't work well now, why would we want to add more oversight?

  • But maybe an existing agency should be given primary responsibility.

  • It would be nice to think we could have a reasonably fair assessment and prioritization process that was at least partially protected from the worst instincts of current politics. I am a dreamer.
We don't need more bureaucracy within the government. We need a way to permit qualified projects in a more effective way.

Yes but it must be regional based with probably 8 or so well staffed regional decision centres. Nothing Washington centric spis. To mirror the Federal Reserve Districts

more government is NEVER the answer. Best outcome results when Government gets out of the way

Lean, but high level to assure durable budget authority and effective implementation

Other Advanced economies have Infrastructure / Investment bodies to prioritize development and associated enablers.

Create an agency that can triage our needs on a national basis, working directly with each state

Without removing infrastructure from the four year cycle of politics it will always be difficult to make progress
“I believe it needs a specialized office in the White House that works with all appropriate government departments and agencies.”

– Survey II Respondent
The level of political authority most critical in project selection

- Surprising result, highlighting the fact that 53% of respondents (a majority) see governors as key infrastructure decision-makers.

- The Federal government comes in a distant second at 27%; and the Congress is seen by the infrastructure community as barely relevant at 8% - just above the 5% that mayors polled.

- One response stands out in this context:
  “many of the priority projects are not location specific (i.e., mayors have limited interest). Fed. gov should have the ability to prioritize investment in a non-partisan way, and assess true value to the public”
POLITICAL AUTHORITY COMMENTS

🌟 Mayors are the few people who can get things done these days.

🌟 Governors are the most direct way to determine infrastructure needs for their states.

🌟 Private experts are the way to cost control priorities projects.

🌟 Given most priority projects are multi-sector and multi-governmental it likely has to be at a Federal Level.
“There needs to be a national vision as well...”
COMPARATIVE GRAPHS
U.S. VERSUS GLOBAL RESPONSES
If infrastructure is to be a driver of recovery, then the most troubling result is how debased the infrastructure brand is around the world.

- Only 18% of respondents say that Infrastructure is a *strong* brand (like Nike, Apple, etc.)
- 30% say it is a *weak* brand (characterized by incompetence, corruption)
- 52% say it is an *average* brand in their countries (providing services, but with occasional problems)

If a recovery were to be based on infrastructure investment, then this is a critical weakness.

82% See Infrastructure as a Weak or Average Brand
AREAS IN WHICH INVESTMENT IS MOST NEEDED

- **Social Infrastructure**, often ignored, is clearly the most needed (28% selected this as their #1 priority, and 55% as one of their top 3 priorities)

- **Clean Water** was highlighted as the #1 priority by 14% (and was listed in a top 3 priority by 48% of respondents)

- Both **Transit** and **Highways** were listed as top priorities by 12% of respondents (in terms of top 3 transit was selected by 42%, and highways by 34%)

- **Wastewater** was selected as a top priority by 11% of respondents (it was a top 3 priority by 41% of respondents)

- No other areas of infrastructure reached 10% as a #1 priority, including **electricity** (6%)