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Michael Taylor: So this is an absolutely enormous problem. And in fact, that Society of Civil Engineers puts a number on it. They suggest that the required investment to get up to speed here is several trillion dollars. The US has already signed acts into being worth more than two trillion. And I think that gives us a scale of what is required here. It's an absolutely enormous problem. So these boring companies with boring histories are about to look, in my view, a lot more exciting.

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