

Poland Infrastructure Report Q3 2016

<https://marketpublishers.com/r/P965D75120DEN.html>

Date: May 2016

Pages: 60

Price: US\$ 1,295.00 (Single User License)

ID: P965D75120DEN

Abstracts

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BMI View: Poland's overall construction market is well developed and the country is home to a number of large domestic construction firms which have expertise in a range of sectors. Transport is the largest subsector and expected to record the strongest overall growth over the next few years as a number of road and rail projects benefit from an influx of EU funding. We are also seeing an uptick in residential construction, supported by improving household incomes and access to financing. The energy sector is the weak link, with private investment undermined by an increasingly uncertain regulatory environment as the government backs away from renewable energy targets.

Latest Updates and Structural Trends

A number of significant transport infrastructure contracts have been awarded in early 2016, including upgrades and extensions to numerous expressways across the country. While road projects are the primary beneficiary of EU funding, we also see developments in rail investments, where projects such as the extension of Warsaw Metro network are progressing.

A draft energy bill from the ruling Law and Justice party looks set to derail progress in wind power by setting extensive planning restrictions on new developments and adding to permit processes and costs. The government is heavily committed to maintaining the dominance of coal power in Poland to shore-up this ailing sector of the economy.

Residential construction is expected to see an uptick in 2016, expanding by 7.9% over the year. The number of permit applications has risen over the first few months of the year and a number of projects have started, so the short-term

outlook for this sector is strong.

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