

Bosnia-Herzegovina Real Estate Report Q3 2012

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Abstracts

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The Bosnia & Herzegovina (BiH) Real Estate report examines the Commercial Office, Retail and Industrial segments throughout the country in the context of the struggling Eurozone economy.

With a focus on the three principal cities of Sarajevo, Trebinje, and Zenica, the report covers the rental market performance in terms of rates and yields over the past 18 months and examines how best to maximise returns in the commercial real estate market, while minimising investment risk and exploring the impact of the eurozone crisis on an already struggling market.

Our latest data collection for full-year 2011 has revealed an industry-wide contraction in rental rates across all geographies surveyed, undoing much of the positive growth seen in 2010. The industrial sector has weathered the storm better than its counterparts due, in part, to the increased lease-length cycle, but in the medium term we expect the retail sector in particular to outperform.

Key Points:

Revisions of land ownership and construction laws are under way, which will provide the industry with a more comparable legal base from which to operate.

Projects to improve local infrastructure and increase foreign direct investment into the sector will positively impact the real estate segment.

Improvement of legislation related to foreign investment, including tax incentives and a reduction in bureaucracy. Included are attempts to strengthen the

protection of assets, and to encourage freedom in their management and disposal.

Over the medium-term, the under-developed retail segment in the country will see increasing activity and improving supply and demand dynamics.

We have revised down our 2011 real GDP growth estimate to 2.4% from 3.9% previously. We have similarly lowered the medium-term forecasts, projecting growth of 1.9% in 2012 and 2.3% in 2013 from 5.3% and 4.5% previously

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