

Colombia Infrastructure Report Q3 2012

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Abstracts

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BMI View: Colombia's underdeveloped infrastructure fleet remains its biggest obstacle to fully exploiting the country's growth potential, which stems from a booming extractive sector. However, the government continues to prioritise investment into the construction sector and President Santos has carried through several structural changes, all of which underpins our strong real growth forecast of 5.4% for 2012. The main reasons for this bullish outlook are: healthy economic growth; a free-trade agreement between Colombia and the United States that was signed on May 15 2012; continuing expansion in the resource extracting sector; the 10-year US\$55bn transport infrastructure budget; the creation of a national infrastructure agency; and the passing of a public-private partnership (PPP) law to facilitate procurement and propel infrastructure growth.

Key trends and developments in Colombia's infrastructure industry include:

Underpinned by strong backing from the Colombian government, we expect the country's infrastructure industry to experience annual average real growth of just below 6% between 2012 and 2021.

The infrastructure industry holds significant potential for investors, with real growth of 6.7% forecast for 2012. The residential and non-residential sector will see real growth of 4.3% - a healthy recovery from the 4.9% decline seen in 2010

Strong economic growth – with real GDP growth of 4.5% forecast for 2012 – and expansion in coal, mining, oil and gas extraction, are creating significant demand for new capacity and better quality infrastructure. Better access to ports and adequate highways will be essential if the country is to meet the expected increase in exports.

Key trends and developments in Colombia's roads and railways include:

Road infrastructure industry value accounts for a significant portion of infrastructure value, with the sub-sector forecast to make up 39% of the total in 2012. Following the passing of a PPP law, we anticipate more private interest in the sub-sector.

Ruta de Sol, the largest planned road project, as well as the largest greenfield public-private partnership (PPP) project awarded in Colombia's transport sector, has entered the construction phase, highlighting the potential for private procurement in the Colombian infrastructure market.

Railways have also received renewed attention, with focus on private, as well as foreign, participation. High-profile projects such as the Carare network and the Ferrocarril Central railway project, as well as China's plans to finance and build a railway-based 'dry canal' to link the country's Caribbean and Pacific coasts, are key drivers behind this revival.

Bogota Mayor Gustavo Petro is lobbying for a department solely in charge of rail infrastructure; if achieved, this is likely to improve the project design and procurement within the sector. This therefore poses an upside risk to our forecasts.

Suspension of the construction of the Oriente tunnel, pending an environmental impact assessment, highlights the persistent lack of coherency between government agencies, and consequently poses a downside risk to our forecasts.

However, we highlight that corruption remains a risk factor:

Colombia scores just 3.7 out of 10 for corruption in the country risk section of our infrastructure risk/reward ratings, following several corruption scandals within Colombia's public works sector. This illustrates our concern of the impact on the country's business environment.

However, a concerted effort is being made to stamp out corruption in awarding tenders. This has been shown by the creation of infrastructure agency ANI,

which has replaced INCO as the official entity in charge of infrastructure concessions. This gives us hope for future improvements.

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