

Croatia Infrastructure Report 2016

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Abstracts

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BMI View: Croatia will gently move out of recession in 2015 with a paltry 0.1% real GDP growth, according to our projections, amid an environment of fiscal initiatives and public sector cuts aimed at reducing the yawning budget deficit, all ahead of an increasingly likely EU/IMF bailout in the near future.

The investment environment is being impacted by the poor economic scenario and the only real hope for infrastructure is in the form of large funds available through EU facilities, of which, fortunately, there are many. The railways and energy infrastructure sub-sectors are forecast to benefit in the near term from extensive European integration and modernisation projects. However, the residential and non-residential building sub-sectors will continue to stagnate, as they miss out on EU focus and lose out to a lack of foreign direct investment (FDI).

Latest Updates And Structural Trends

The recession has laid the construction industry low by limiting government investment and weakening domestic demand. FDI is being hampered by an uncompetitive business environment in need of structural reforms aimed at lowering labour costs and shrinking bureaucracy. At the same time, Croatian banks will struggle in the corporate loan market, with internal and external demand remaining low, as businesses put projects on hold or seek alternative funding.

Croatian infrastructure will rely heavily on EU funding, with the country set to benefit from two particular project financing vehicles: the EUR64.3bn Cohesion Fund and EUR14.9bn Connecting Europe Facility (CEF). These will support the

funding of the TEN-T transport corridors and TEN-E energy networks, which have a heavy weighting towards the less developed networks in Eastern and Central Europe. The transport sector likely to benefit most from the CEF is railways, as the EU looks to develop and modernise the Rhine-Danube, Orient-East Med and Baltic-Adriatic corridors to boost regional business and tourism ties.

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