

Romania Infrastructure Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Although construction growth will slow in 2016 on the back of a weaker than expected first quarter, Romania's construction sector growth will nevertheless outpace the European average over the next five years as EU funding inflows seek to alleviate the country's significant infrastructure deficit. An improving macro-economic climate and expansionary fiscal policy will buoy residential construction, a sector we expect to outperform in 2016 and over the first half of our ten-year forecast. Romania's growth potential is clouded by significant risks, however, as the country's construction sector remains plagued by corruption and a lack of transparency, factors which have caused numerous project delays and cancellations.

Latest Updates And Structural Trends

We revised our 2016 construction sector growth forecast downwards to 6.8% on the back of weaker than anticipated Q116 data. The transport sector will be hardest hit and we have downgraded our growth outlook for the sector to 4.2% from 9.2%. We expect a slight uptick in transport sector growth in 2017 as EU funding inflows resume and have accordingly revised our growth forecast upward to 6.5%

Positive housing data indicating a steady growth in issued building permits as well as a brightening macroeconomic outlook for Romania underpins our expectation residential construction will emerge as the outperformer in 2016, with growth projected at 9.5% this year and annualised average growth over the next five years anticipated to be 4.8%.

The ongoing anti-corruption drive continues to gather pace in Romania, with the

technocratic government of Dacian Ciolos prosecuting more than 1,250 individuals last year. While the initiative has the potential to improve Romania's business environment over the long term, in the short term we have seen it have a negative effect on infrastructure growth, as public officials remain wary of possible corruption charges and are therefore less likely to move ahead with tendering opportunities and financing decisions.

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