

Slovenia Infrastructure Report Q1 2011

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Abstracts

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Core Construction Forecasts: Slovenia's construction market remains in recession. After recording a contraction of 15.5% in real terms in 2009, the market was on course to experience a further 14.7% contraction in real output in 2010, according to BMI forecasts made late during the year. This reflected not only the global economic downturn (which has negatively affected construction markets around the world), but also the fact that Slovenia's economic downturn has been more extended than its regional peers. In the first half of 2010, Slovenia's construction market underwent a contraction of 14%. We thus expect a slight further worsening of construction output in H210.

Thereafter, we anticipate only a modest recovery. We predict construction market growth of 3.4% in real terms in 2011, before only a slight further recovery so that market growth will range between 4.0% and 5.0% per annum during the remainder of our forecast period (2012-2015). As such, it will be 2015 before the construction sector surpasses its 2008 value, in euro terms, according to our forecasts.

Business Environment Ratings: Slovenia scores well in our regional business environment ratings. The country is ranked in second place, out of a total of 16 countries in Central and Eastern Europe. Slovenia scores particularly well in terms of Country Rewards, and also does well in the Country Risk category. However, it would likely take a substantial improvement in the Industry Rewards category, in order for Slovenia to challenge Poland, the top-ranked nation in our league table.

Project Finance Risk Ratings: Overall, Slovenia comes second in our Project Finance ratings for Eastern Europe, with a score of 66.6 out of 100. This is comfortably ahead of Slovakia, with 63.8 out of 100, but some way behind Poland, which scores 69.6 out of

100. Slovenia would need a significant improvement in its scores for the inputs category in the Commissioning & Operating phase, if it were to challenge Poland for regional leadership of our Project Finance league table.

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