



Newest PMR reports

Euro 2012 in Poland **Construction investments**

Euro 2012 in Ukraine **Construction investments**

Publication date: February 2008

Language: English, Polish

A word from the authors



"The organisation of Euro 2012 is one of the best things that could happen to the Polish economy. The construction and tourism sectors will surely benefit. Preparations for the tournament will influence an acceleration of earlier planned transport investments, and will also contribute to a noticeable improvement in sporting infrastructure. The fewest problems related to the organisation of the championship will occur in hotel construction investments, as these are supported by private capital. More difficulties may definitely be caused by the development of transport infrastructure, especially if public institutions undertake to build new highways".

Bartłomiej Sosna, Construction Market Analyst, Author of the report Euro 2012 in Poland



"The co-hosting of Euro 2012 is a real challenge but at the same time a huge chance for a big step forward for Ukraine. It offers Ukraine a unique opportunity to show Europe and the rest of the world that it is a young but rapidly developing country able to hold the largest event since the regaining of independence. Furthermore, preparations for the championships, and the related huge investment projects, may bring Ukraine closer to other European countries, both in terms of the development of infrastructure and the general living standards. However, this will require resolving of a number of problems existing at all levels – from political disputes, to lack of clear division of decision-making powers, problems with identification of funding sources for particular projects, and ownership of airports. Otherwise, instead of gaining, Ukraine will lose prestige".

Robert Obetkon, Construction Market Analyst, Author of the report Euro 2012 in Ukraine

PMR MarketInsight Methodology

These reports were prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. **It also contains special procedures to follow in the case of incomplete market.**

PMR MarketInsight precisely defines report content and structure. Industry reports prepared using PMR MarketInsight are based on information from a variety of available statistical, industry (specialist press, the internet), general and official sources as well as information from PMR's own database and primary research independently carried out by PMR. The sources we use are individually tailored to each project. **PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.**

PMR
MarketInsight
Methodology

More than
PLN 5bn will be
invested
in the
hotel industry
in Poland
during next
5 years.

Reports description

Euro 2012 in Poland and Euro 2012 in Ukraine are two separate reports specially formulated to present a detailed and informative description and status report of preparations for the European Football Championship in 2012 in the two host countries.

Reports and analysis are provided to describe the current state of infrastructure as well as the targeted levels of transportation, sport and hotel infrastructure and facilities, with information as to specific investment and construction plans formulated to achieve required levels as the date of the event approaches.

Euro 2012 in Poland and Euro 2012 in Ukraine include information additionally obtained from reports related to the organization of Euro 2012 in the applicable host country, sector press, economic press, documents published by public institutions and interviews with experts from the hotel, transport and sport sectors. Investment forecasts were assembled using government and private sector development plans and other data.

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Total value of investments: Euro 25bn! 2008 will be decisive for choosing the contractors!!!

Both reports present a complete description of the progress of infrastructure preparations for the event in 5 sections:

Section One

enters a detailed description of Euro 2012, presenting the needs and requirements of the event, setting up the parameters of construction work and infrastructure upgrades necessary in Poland or Ukraine prior to the established deadlines set by organizers of the European Football Championship for 2012.

Section Two

delves into the transportation infrastructure, perhaps the most challenging aspect of preparation for Euro 2012, evaluating the existing components and needed upgrades to facilitate transportation into each country and between the cities that will host the event. This section covers primary modes of transport that will be used, including the networks that support and facilitate road, railway and air transport.

Section Three

investigates the existing assets and needed improvements in terms of the sports infrastructure, which refers to stadiums and training centres needed to accommodate the European Football Championship in 2012.

330 new hotels need to be constructed in Ukraine by 2012, so that their total number goes up by 25%.

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The development and modernisation plan adopted by the Ukrainian State Railways for 2008-2015 envisages investment outlays in excess of €12bn, with a lion's share of these funds to be spent by 2012.

Section Four

surveys the hotel infrastructure in the host cities, providing information concerning hotels, current availability of rooms and projected availability through new construction, as well as planned investment by selected operators and development groups.

Section Five

covers forecast investment and the related development plans for airports in Poland or Ukraine during the period from 2008-2012.

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Reports overview

The European Football Championship in 2012 represents a major boost for the Polish and Ukrainian economies, especially for the construction and tourism sectors.

There are challenges to be met, especially in terms of transportation infrastructure improvements. However, many opportunities for investment and growth exist, and this report can be of help in identifying them by providing a complete description of Euro 2012 and revealing the requirements for various main and ancillary events surrounding the tournament.

Development of the transportation infrastructure needed to support and facilitate Euro 2012 presents greater challenges than the other sectors, as renovation and construction of these networks depends on government funding to a greater extent.

By 2012 Ukraine plans to build more than 800 km of new roads, modernise over 560 km and repair 2,900 km.

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The number of tourists visiting Poland will grow from 15.7m in 2006 to approximately 19m in 2012-2013, which implies an average annual growth of almost 3%.

These reports explore:

- road transport, including the target networks of express roads, highways and other motor ways that will be used to transport athletes, observers and event staff into the country and from city to city and between venues as the tournament progresses
- railways, and their functions in support of the event preparations as well as the event itself, both leading up to and during the tournament, as well as detailed information about the main railway investments in Poland or Ukraine
- air transportation, and levels of airport investment and development required to accommodate the increased arrival of tourists and athletes prior to, during and after the event.

Polish and Ukrainian cities will experience a number of sport infrastructure improvements including a variety of facilities, from stadiums for the huge crowds that are forecast to flock to the matches to training centres for athlete's use in preparation for the tournament.

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These two reports present overviews of these planned facilities, including details on:

- stadiums-related UEFA regulations
- investments related to the construction and renovation of stadiums
- investments related to the construction of required athletic training facilities.

Poland's expanding business and tourist sectors, along with anticipation of Euro 2012 tournament, have spurred a resurgence of sorts in planned hotel investment and construction.

At the moment, Boryspil airport (near Kiev) and the airport in Donetsk are best prepared for the championships, yet they too need major investments.

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Construction and modernisation of six stadiums in Poland for Euro 2012 will cost almost PLN 3bn.

Euro 2012 in Poland provides the details, including:

- volume of arriving tourists in Poland 1996-2013
- layout of the current hotel network in Poland, with information on the various categories of establishment, ranging from five-star to economy
- number of rooms available and room rates as compared to those in other European capitals
- details on planned investment in hotel construction and renovation by top groups operating in the sector.

Euro 2012 in Ukraine presents information on the hotel infrastructure in Ukraine, including:

- analysis of the hotel infrastructure, particularly in host cities, by category
- numbers of tourist arrivals in Ukraine in recent years
- planned hotel investment in Ukraine to 2012, by city.

The increased volume of visitor traffic entering Poland and Ukraine will require investment in and development of each country's airports. **Euro 2012 in Poland and Euro 2012 in Ukraine detail these activities and the related levels of projected investments.**

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Also presented in each separate report

- Investment forecasts for activities related to the organization of Euro 2012 in Poland or Ukraine by city and sector
- Contact information of the investment coordinators for Euro 2012-related activities in the applicable country
- Information on legal changes aimed at the acceleration of investments related to preparations for Euro 2012.

PLN 2bn will be assigned to smaller stadiums and training centres for Euro 2012 in Poland.

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According to Ukraine's Ministry of Transport and Communication, at least €560m will be necessary during the next 3 years to modernise Ukrainian airports.

These two reports are indispensable business tools for:

- senior management personnel of construction companies active in Poland or Ukraine and surrounding areas
- strategic planners and executives of firms considering entry into the Polish or ukrainian construction markets
- companies engaged in construction and those active in the production and distribution of building materials in the region
- architectural and consultancy firms interested in this market
- developers interested in participation in the Polish or Ukrainian hotel construction markets
- businesses that provide goods and services integral to the hospitality and athletics industries
- consultants and analysts that provide advice and intelligence to governmental and business organizations, as well as those seeking investment opportunities.

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