

67<sup>th</sup>



# Euroconstruct Conference

**Prospects for the European Construction  
Markets in 2009-2011**

**The crisis in the European construction market**  
*Conditions and possibilities of overcoming the crisis in  
the European construction market*



**4th and 5th June  
Warsaw 2009**

**Polish Construction Research & Forecasting Institute**



**Honorary patronage**  
of the EU Commissar  
for Regional Policy



**Honorary patronage**  
of the President of the  
Capital city of Warsaw



**Honorary patronage**  
of The Chairman  
of the Parliament Commission  
of Infrastructure

*Friday, 5th of June*



## **Conference**

The conference will be held in an exceptional location, the historical building of NOT - Warszawski Dom Technika, in downtown Warsaw

8:30 Registration  
17:00 End of the main conference

*Thursday, 4th of June*



## ***The supplementary programme***

### **The welcome evening**

17:30 A guided tour of the Wilanow Palace Museum - from 1608 to 1791 the summer residence of the Polish kings and dukes  
19:00 Reception hosted by the Mayor of Warsaw

*Saturday, 6th of June*



### **Tourist trip**

9:30 The sightseeing of the National Stadium for EURO 2012 under construction

**Morning session Prospects for the European Construction Markets in 2009-2011**

*The morning session of the conference will consist of 6 presentations providing forecasts and analysis of the European construction markets this year as well as in 2010 and 2011. After the opening of the conference, the first session will be focused on the macroeconomic situation in the 19 European countries covered by the Euroconstruct network. Thereafter prospects for the various European construction markets (housing, non-residential buildings and civil engineering) will be given. The morning session will be concluded with a summary outlook for the European construction markets.*

08:30 **Registration**

09:10 **Opening remarks**

09:20 **Europe Macroeconomic review and Perspectives**

Georg M. Busch - EU DG Economic and Financial Affairs, Brussels

09:45 **The Housing Market in Europe**

Annette Hughes - DKM Economic Consultants, Ireland

10:10 **The European Non-Residential Market**

Pekka Pajakkala - VTT, Finland

10:35 **Coffee break**

11:00 **Trends in European Civil Engineering and Infrastructure Markets**

Yngve Abrahamsen - KOF Swiss Economic Institute, ETH Zurich

11:25 **Construction trends in Southern and Eastern European countries (non-Euroconstruct)**

Anna Gaspar - Buildecon, Hungary

11:50 **European Construction Trends to 2011**

Mariusz Sochacki - PAB-PCR&F Institute, Poland

12:15 **Questions and Discussion**

12:40 **Lunch**

**Afternoon Session The crisis in the European construction market**

Conditions and possibilities of overcoming the crisis in the European construction market

*In recent months, construction market activity has declined sharply in a number of European countries. The effects of the financial crisis on European construction will be evaluated and State and governmental activities aimed at limiting the damage to construction markets in particular countries will be discussed. The activity of the European Commission and the role of EU cohesion funds in mitigating the negative effects of the economic slowdown on construction in Central-Eastern EU countries will also be presented. The afternoon session will focus on the conditions needed and possibilities forthcoming of overcoming the crisis in the European construction market.*

**14:00 Opening remarks****14:10 The world financial crisis - implications for the European construction market**

Jacek Łaszek - Advisor, Head of the Real Estate Unit at Economic Institute of National Bank of Poland

**14:30 State and government activities aimed at limiting the construction markets crisis**

Josep R. Fontana - Head of the Construction Market Intelligence Unit at IteC, Spain

**14:50 The financial crisis – implications for the non-residential construction market**

Agnieszka Jachowicz - Head of the Polish Investment Fund ARKA, Poland

**15:10 Russian construction market in the time of crisis - today and tomorrow**

Robert Myhlew - Head of the Valuation and Strategic Consulting at Russia & CIS Jones Lang LaSalle, Russia

**15:30 Questions and Discussion****15:40 Coffee Break****16:00 Round table discussion**

*The conditions needed and possibilities forthcoming of overcoming the crisis at the European construction market*

**17:00 End of the main conference**

# Benefits of participation

Participation in the 67th Euroconstruct Conference is a unique opportunity to understand the latest trends in the construction industry in this time of financial turbulence and economic downturn on the European market of real estates and their effects for the development of construction industry till 2011.

## Why participate?

The aim and special topic of the Conference is to assess the worsening of the European economy and its negative impact on the construction industry over the recent past. The breakdown of the global economy is significant and has such large implications that the reasons for it, and its negative results require deep analysis and evaluation. Stagnation and even recession in European construction is a fact now - the results of the survey carried out amongst the members of Euroconstruct in March 2009 show that falls in production in 2008 and the prognosis for 2009 are worse now than those presented in December 2008 in Brussels. The 67th Euroconstruct conference in Warsaw will consider whether the outlook for European construction could be even worse.

## The Conference will endeavour to provide some answers to the following key questions:

- *How deep is the decline in European construction as a whole and in the particular countries likely to be? Are there countries that will escape the recession in construction?*
- *Which construction sectors (residential, non-residential or civil engineering) are the most sensitive to the crisis?*
- *Has the construction industry already seen its biggest fall in production or is it worse to come? What is the situation in particular countries of the Euroconstruct network and in individual construction sectors?*
- *What economic factors need to come into play to stop the decline and when are they likely to be seen?*
- *Which players in the construction market will be the worst affected by the crisis and when?*
- *What measures are being taken by governments and other authorities to limit the construction market crisis in particular countries?*
- *What is the role of EU cohesion funds in the limitation of the negative effects of the economic crisis on construction in Central and Eastern EU countries? Has the financial turmoil affected the economies and construction markets of non-EU countries such as Russia and the Ukraine and to what extent?*

Two hundred decision makers and experts representing more than 20 countries from Western and Eastern Europe and overseas are expected in Warsaw on June 4-5, 2009. The Warsaw EUROCONSTRUCT conference targets decision makers in the construction industry and related markets as well as the financial and consulting sector and it offers a wide range of advantages.

## • Offers exclusively

- First access to the latest information, including projections to 2011, and to the speakers' presentations and commentaries.
- The opportunity to discuss with Euroconstruct experts and to meet the representatives of the biggest companies in the construction sector of Europe and the rest of the world.
- Participation in the reception evening and a special rate for the "Country Report". The sightseeing of the Wilanow Royal Palace and National Stadium for EURO 2012 under construction

## • EUROCONSTRUCT Reports – European Construction Indicators at a Glance

EUROCONSTRUCT's publications deliver high quality construction business and market information in Western and Eastern European countries.

## The Euroconstruct Network

EUROCONSTRUCT is a network of 19 specialised European research institutes founded in 1975 as a study group for construction research and forecasting, which arranges an international conference twice a year.

### Member Institutes:

Austria	WIFO Austrian Institute of Economic Research
Belgium	Aquiec-Vkebi Association pour la Qualité des Indicateurs Économiques de la Construction
Czech Republic	URS Praha Institute of Rationalisation of the Construction Industry
Denmark	CIFS Copenhagen Institute for Futures Studies
Finland	VTT Building and Transport, Business Intelligence
France	BIPE
Germany	IFO Institute for Economic Research
Hungary	Build&Econ Building Economy, Art and Architecture Consulting Office
Ireland	DKM Economic Consultants
Italy	CRESME Centro Ricerche Economiche e Sociologiche di Mercato nell'Edilizia
Netherlands	EIB Economisch Instituut voor de Bouwnijverheid
Norway	Prognosesenteret AS PS - Building and Construction Research
Poland	PAB Polish Construction Research & Forecasting Institute
Portugal	ITIC Technical Institute for the Construction Industry
Slovakia	UEOS - Komerčia, a.s
Spain	ITeC The Catalonia Institute of Construction Technology
Sweden	Prognoscentret AB Prognosesenteret AB (Part of the Analysgruppen AS)
Switzerland	KOF ETH Swiss Institute for Business Cycle Research, Swiss Federal Institute of Technology, Zurich
United Kingdom	Experian Business Strategies

EUROCONSTRUCT'S network also extends to the Japan (Research Institute for Construction and Economy, RICE, Tokyo) and Korea (Construction & Economy Research Institute of Korea, CERIK, Seoul).

# Conference Information

## Venue

**Warszawski Dom Technika NOT Sp. z o.o.**

00-043 Warszawa

ul. T. Czackiego 3/5

Telefon: +48 22 336 12 23

## Languages

The conference will be held in English and Polish.

Simultaneous translation will be available in English, German, French and Polish

## Registration

Conference registration can be done via fax or online

- **Fax:** Please send us enclosed registration form
- **Online:** [www.euroconstruct.pl](http://www.euroconstruct.pl)

You will receive a written booking confirmation. Please register no later than 15th May, 2009.

EUROCONSTRUCT's publications deliver high quality construction business and market information in Western and Eastern European countries.

The EUROCONSTRUCT Summary Report is provided to all conference participants. Country by country analysis can be purchased with the EUROCONSTRUCT Country Report. It includes detailed forecast and trends by sectors based on a consolidated data base in 19 EUROCONSTRUCT countries to 2011.

**EUROCONSTRUCT reports cover the following detailed indicators for the construction sectors:**

### Euroconstruct summary report

A global approach to the European markets (about 250 pages)

The summary report describes the general economic context and the outlook for construction for the period until 2011

- Macroeconomic trends in Europe
- Prospects for the different European construction market
  - Market trends of the non-Euroconstruct countries
- Global prospects of the European construction market trends

Important part of the report is also dedicated to the special subject of Conditions and possibilities of overcoming the crisis of the European construction market

### Euroconstruct country report

A detailed approach to each country of the Euroconstruct network (about 450 pages)

The country report includes detailed tables of the forecasts presented by the different countries along with an analysis by specialists from each country

- The main demographic and economic indicators
- Construction by type 2005-2011
  - Residential, non-residential and civil engineering
  - New, renovation and total
- Residential construction 2005-2011
  - Building permits, housing starts and housing completions
  - Family dwellings and flats, Housing stock ownership rate, etc.
- Non-residential construction 2005-2011
  - Buildings for education, health, industrial buildings, commercial buildings, offices and others
- Civil engineering 2005-2011
  - Transport infrastructure, telecommunications, energy and water works, and others

# 67TH EUROCONSTRUCT CONFERENCE REGISTRATION FORM

Please return this form and payment by May 15, 2009 at the latest to:

**PAB-PCR&F Institute**

00-519 WARSAW, WSPOLNA Str No 37/24, Poland  
Tel +48 22 628 88 37. Fax +48 22 629 03 85



## 67th EUROCONSTRUCT CONFERENCE

June 4-5, 2009

Warszawski Dom Technika NOT

ul. T.Czackiego 3/5, 00-043 Warszawa, Poland



Please type or print in capital letters – the details will be used for your NAME BADGE!

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Job title: \_\_\_\_\_

Organisation: \_\_\_\_\_

Accompanying person(s):

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address: \_\_\_\_\_

Postal Code: \_\_\_\_\_

City: \_\_\_\_\_

Country: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

### REGISTRATION OPTIONS

Conference fees

(please tick the appropriate boxes)

EU clients registered for intra-community  
VAT and clients from outside the EU

Polish clients and EU clients not  
subject to intra-community VAT

Conference Fee I (incl. Summary Report)

€ 1,200,0 excl. VAT

€ 1,464,0 incl. VAT

Conference Fee II (incl. Summary and Country Report)

€ 1,980,0 excl. VAT

€ 2,415,6 incl. VAT

Additional participants from the same institution – 50 % discount

Conference Fee I (incl. Summary Report)

€ 600,0 excl. VAT

€ 732,0 incl. VAT

I will attend the evening reception (incl. in the conference fee)

My partner would like to attend the evening reception

€ 100,0 excl. VAT

€ 122,0 incl. VAT

Country Report special price only for participants

€ 780,0 excl. VAT

€ 952,0 incl. VAT

TOTAL € \_\_\_\_\_ excl. VAT € \_\_\_\_\_ incl. VAT

If you are VAT registered, please be certain to specify your intra-Community VAT number \_\_\_\_\_

### PAYMENT

Please send completed registration form to PAB-PCR&F. We will reconfirm all requested services and the exact amount due. To guarantee your registration full prepayment is required. After receiving your full payment we will send you all required vouchers. Please arrange your payment according to the confirmation from us.

All payments must be made in Euro (€).

I am paying my order in full:

with enclosed cheque, made out to **PAB-PCR&F** 00-519 WARSAW, WSPOLNA Str. No. 37/24, Poland

by bank transfer to following account: **PAB-PCR&F** 00-519 WARSAW, WSPOLNA Str. No 37/24, Poland

**PKO S.A. O/Warszawa** SWIFT: **PKO P PL PW** Account No: **PL 91124060031978000049432374 (EURO)**

Please note, that all payment fees have to be settled by the remitter. Please mention the name of your company.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_