

Russia Power Report Q4 2016

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Abstracts

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BMI View: Russia's power sector continues to suffer from the effects of an ongoing economic recession and sanction regime, a weakened currency, and low oil prices. Based on consequent subdued consumption levels paired with high investment uncertainty, we continue to expect muted growth for our ten-year forecast despite the country's rich resource endowment and size of its market.

Latest Updates And Structural Trends

The broader economic and political backdrop frames our views on the Russian power sector in 2016. The annexation of Crimea and perceived Russian belligerence towards the West has shattered investor confidence and will deter significant foreign investment. Meanwhile, global oil prices of between USD30/bbl in early 2016 and USD45/bbl in mid-2016 have made the government's budget assumptions untenable, which will necessitate further spending cuts. At the same time, tight credit conditions - exacerbated by international sanctions - will drag on economic growth.

These Fiscal pressures in Russia appear to be accelerating the privatisation of stakes in state-owned companies, including state-owned oil giant Rosneft. That said, we are very sceptical that this will play out according to plan, given deep suspicion among the Russian population of privatisations following the experience of the 1990s, as well as the reluctance of President Vladimir Putin to relinquish control over strategic assets, and in particular at severely discounted valuations.

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