

Chile Power Report Q3 2016

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Abstracts

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BMI View: Chile's power market will be one of the most attractive and dynamic in Latin America over the next few years, owing to the country's stable business environment and investor-friendly regulations, a solid macroeconomic outlook and robust growth in power consumption. The government's use of energy auctions for the regulated market, coupled with energy demand from miners located far from the main power network, will create long-term business opportunities for power generators. Meanwhile, the need to expand Chile's power grid will drive demand for transmission infrastructure.

Latest Updates And Structural Trends

The latest investment plans of major international energy companies operating in Chile have strengthened our positive outlook for the country's power sector. Spain's Gas Natural Fenosa and Red Eléctrica and Italy's Enel will all increase their exposure to the market over the next few quarters.

Popular opposition to the development of large-scale hydropower projects remains a key downside risk to our forecast for the hydropower sector. In particular, we highlight hostility to the completion of the 531MW Alto Maipo hydropower complex remains strong, although construction of the project is progressing.

A bill presented by the government in 2015 to reorganise the structure of Chile's power transmission sector is currently under consideration by the Senate. The document was approved by the lower house of the parliament in January 2015. The bill aims to accelerate the development process of new power transmission lines and facilitate investment in the sector. We expect the government to push for

the new regulation to be approved ahead of the July-August 2016 energy auction for the regulated power market.

It was announced that Gas Natural Fenosa and E-CL are considering building gas-fired power plants in Chile. This development, together with a significant pipeline of projects already under construction and planned, supports our positive growth outlook for gas-fired power generation in Chile over the next 10 years. Our forecast is also premised on the construction of an LNG import terminal, low international gas prices and the government's commitment to increasing the role of gas in Chile's energy matrix.

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