

Colombia Power Report Q4 2016

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Abstracts

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BMI View: With the rain finally returning and rivers such as the Magdalena flowing fast again, Colombia appears to be finally getting over the worst. For months Colombia's electricity supply was threatened following a nationwide drought brought on by El Niño that slowed the rivers that power the nation's grid. The Government was only able to avoid blackouts thanks to a combination of a series of energy-saving measures, an increase in imports of energy from Ecuador and the use of emergency oil-fired thermal generators. The Minister of Mines and Energy, Germán Arce Zapata has so far announced that the country will strengthen its electrical system to make it "more reliable and efficient" against climate phenomena such as El Niño. However, with hydropower currently accounting for 70% of the country total generation, we believe that the country will need considerable investments to diversify its energy supply, to meet the increasing demand for power.

Latest Updates And Structural Trends

The impacts of the drought created by the El Niño weather phenomenon will be the main driver of developments in the Colombian power market in 2016. We expect a sharp fall in hydropower generation in 2015-2016, which has forced additional diesel and natural gas-fired power plants to be dispatched. The availability of excess thermal capacity to be used during periods of poor hydrology and plans to import natural gas should both allow Colombia to avoid experiencing power cuts, albeit narrowly.

Further policy support to the sector and the creation of the necessary power transmission infrastructure will be required to kick-start Colombia's underdeveloped renewables industry. Until these conditions materialise,

distributed generation will be the most likely segment to see developments in the country, owing to vast swathes of the Colombian territory not being connected to the electricity grid.

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