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Abstracts

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BMI View: This quarter our view on the Czech power market remains largely unchanged, while concerns over the country's energy security and carbon emissions profile move to the forefront.

The future of nuclear and renewables in the country looks increasingly uncertain as the development of sources experienced setbacks and questions about Czech energy security and its emissions profile are becoming more pronounced.

With ageing domestic capacity scheduled to come offline over the coming two decades and EU regulations pressuring the country to lessen its dependence on coal, nuclear and renewables had appeared to be the preferred method to fill any future power gap.

However, this is now in doubt, with the country showing inclinations to maintain an important share of coal-generated electricity in the mix.

We further believe that the Czech Republic's export status could be in jeopardy as a result of a failure to build new power generation capacity.

Key Trends And Developments

Allowing for system losses, power supply should continue to outweigh demand, enabling continued net exports to neighbouring states. This quarter, we expect Czech power generation to reach 83.30TWh in 2015 and expect it will decrease between 2015 and 2024, to reach 77.5TWh.

Czech Coal, CEZ and a partnership between EPH, and the PPF investment

company are the three bidders that have expressed their interest in acquiring Vattenfall's German lignite and hydro activities. Vattenfall is divesting its German mining and generations assets as part of its strategy to transform its energy portfolio strategy shift.

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