

# Denmark, Finland and Sweden Power Report Q1 2012

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## Abstracts

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BMI View: Our power industry forecasts for the Nordic countries have been revised this quarter following the release of new historical data by two of our main reference sources. Although, as a result, some quantitative differences have appeared in our forecasts, we highlight that our main view on these markets remains unchanged. All three countries considered in this report are mature electricity markets and they will show a modest growth both in terms of generation and consumption over the forecast period. This considered, the main priority for Denmark, Finland and Sweden is substituting ageing plants and acquiring additional cleaner generation capacity.

As for other mature electricity markets, especially European ones, demand in Denmark, Finland and Sweden is expected to increase only moderately in the coming years, supported by positive but measured economic and demographic performances. Following the expansion of our forecasts to 2021, and taking into account our Country Risk macro forecasts, we also highlight that risks are strongly weighted to the downside, as both the US and eurozone economies show continued signs of weakness and fiscal austerity increases the level of uncertainty, limiting investments in new capacity.

### **Recent key developments observed in the Nordic markets include:**

Finnish nuclear power consortium Fennovoima Oy has chosen Pyhajoki as the site for its nuclear power plant. The new nuclear power plant will be constructed on Hanhikivi peninsula on the coast of Bothnian Bay. The consortium had invited France's Areva and Japan's Toshiba Corp. to bid for the construction of a new nuclear power plant in Q3 2011, with an announcement in contrast with a trend observed in several European countries, where plans for new nuclear reactors have been scrapped or are now subject to more stringent regulations in

aftermath of the Fukushima nuclear crisis.

We highlight that EDF's recent announcement that it will delay its Flamanville 3rd generation EPR reactor by another two years rises alarm bells as the development raises questions regarding the safety audits on the same reactor under construction in Finland, where delays and cost overruns have also haunted the developer, Areva. We thus see potential downside risks to the timely completion of the Olkiluoto 3, expected to start operation in 2013.

Sweden has been especially active in the development of wind farms, with various projects approved or in the pipeline. For instance, Skanska Infrastructure Development, wind farm developer O2 and Jamtkraft will jointly invest SEK1.1bn (US\$173.02mn) in the Sjisjka wind power plant in the Gallivare municipality, a 78MW plant expected to become operational in 2012.

In October 2011, Swedish energy company Vattenfall started the divestment of its electricity and heat distribution properties in Finland, according to the CEO of its Finnish operations, Hannu Kostinen. The divestment plan is part of the company's strategy to sell non-core properties, and it is aimed at reducing costs and debt.

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