

Greece Renewables Report Q2 2016

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Abstracts

BMI View: After a decade of impressive growth, the Greek non-hydro renewables industry came nearly to a standstill in 2014 and 2015, largely on account of regulatory changes introduced under the New Deal in mid-2014 as well as persisting economic and political challenges. While several recent project announcements highlight the industry's potential, we believe Greece's non-hydro renewables expansion will remain anaemic over the coming decade.

Latest Updates and Structural Trends

According to the most recent data from the Greek electricity market operator LAGIE, we have downgraded the country's installed renewables capacity to 3,876MW for 2015. Solar capacity was estimated at 2,042MW, while wind added another 1,781MW. Biomass was the smallest segment in Greek renewables industry with total installed capacity of 53MW.

The latest data from ELETAEN, the Greek Wind Energy Association, revealed that 171.8 MW new wind-energy facilities were installed in 2015. Another 210.7 MW of wind energy parks were under construction (energypress.eu).

The renewable energy sources (RES) Fund was expected to end 2015 with a deficit of EUR15.7mn, according to a forecast made by LAGIE in November 2015.

We retain our forecast for non-hydro renewables' contribution to the country's total power mix to remain largely stable over the coming decade. By the end of our review period, both non-hydro renewables capacity and generation are forecast to contribute 15.1% to the country's overall power mix, marking a slight decline from 2015 figures.

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