

# Italy Power Report Q1 2016

<https://marketpublishers.com/r/I79304A1E0EEN.html>

Date: January 2016

Pages: 61

Price: US\$ 1,295.00 (Single User License)

ID: I79304A1E0EEN

## Abstracts

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BMI View: Non-hydropower renewables and transmission and distribution networks will be the most attractive sectors in the Italian power market in 2016, due to planned financial incentives for non-PV renewables and public and private focus on the development of additional cross-border power interconnections.

Delays in the introduction of a capacity market maintain our outlook for the Italian thermal power sector grim, with further retirements expected to take place.

### Latest Updates And Structural Trends

The first round of auction for a simplified thermal capacity market didn't take place in September 2015, the deadline initially recommended by the Italian energy regulator AEEGSI in March. This makes unlikely that a capacity market will be introduced by 2017, the deadline suggested by AEEGSI to guarantee the stability of the Italian power market. These factors, coupled with low wholesale electricity prices and growing renewables power generation, support our negative outlook for Italy's thermal power sector - with additional capacity retirements expected.

The narrow margins of Italy's thermal power generators could push players in the sector towards consolidation. As a potential first step in this direction, in November 2015, utilities A2A and Sorgenia agreed on the shared management of two CCGT power plants for a period of five years. The aim of the operation is to enhance the efficiency of the grid and of the plants involved.

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