

Kazakhstan Power Report Q2 2016

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Abstracts

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BMI View: This quarter we have extended our forecasts to 2025. This notwithstanding, our view on the Kazakhstan's power market remains largely unvaried. We continue to expect healthy growth in Kazakhstan's power sector over BMI's 10-year forecast period to 2025, in terms of generation and consumption. Although coal will continue to maintain its dominance over our ten-year forecast period to 2025, non-hydro renewables will grow rapidly, with a slew of foreign-financed wind and solar projects in the pipeline. The government also plans to restart the exploitation of nuclear energy, helped by Kazakhstan's vast uranium wealth. Power production will comfortably meet demand, with Kazakhstan's dependence on energy imports decreasing over our forecast period.

We expect the Kazakh solar power sector to register limited growth over the next five years, as a result of the sporadic completion of only a small number of solar power projects. This will be in large part the result of investment prospects in the sector being undermined by uncertainty over the country's economic outlook and Kazakhstan's challenging business environment.

Kazakhstan remains committed in developing its first nuclear power plant. In October 2015, Kazakhstan's Vice-Minister of Energy Bakhytzhan Dzhaksaliyev said Kazakhstan will decide the location and strategic partner for its first nuclear power station in the following two to three years.

In October 2015, Kazakhstan announced that, 65 of the largest Kazakh state-controlled companies in the oil and gas, transportation, energy and nuclear sectors, including Samruk Energo will be privatised via an IPO between 2016 and 2020. The decision to sell a stake in the state-controlled energy companies was precipitated by both political and economic factors: the country's export-

driven, hydrocarbon-based economy suffered greatly amid crashing commodities prices, and mismanagement of its currency exacerbated these problems further.

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