

Nigeria Power Report Q1 2016

<https://marketpublishers.com/r/N17958CC0C3EN.html>

Date: December 2015

Pages: 65

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

ID: N17958CC0C3EN

Abstracts

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BMI View: We expect private investors in Nigeria's power sector to defer much-needed investment in new generation capacity due to uncertainty over the ongoing electricity sector liberalisation process and a deepening economic malaise. Both sector-specific and economic factors are likely to deter private investors, who will ultimately be needed if Nigeria is to bridge its huge electricity infrastructure gap.

Latest Updates And Structural Trends

We maintain our view President Muhammadu Buhari will attempt to build on the power sector privatisation momentum that initially gathered pace following the unbundling of Power Holding Company of Nigeria (PHCN) in 2013, but we now believe private investors will sit on the sidelines for the time being. They will do this until there is more clarity over energy policy and the economic outlook stabilises.

There has been little tangible progress with regards to further liberalisation of the power sector. In mid- November 2015, Babatunde Fashola, the former governor of Lagos, was appointed minister of power, works and housing - but this was almost six months after the election. There has been policy paralysis in the meantime, with investors waiting to see how Buhari's administration will deal with basic points like revisions to the Multi-Year Tariff Order (MYTO).

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