

Poland Power Report Q4 2016

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Abstracts

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BMI View: Poland's power sector will remain dominated by coal-fired generation across the coming decade, as the country's PiS government continues to favour this strategically important sector over gasfired generation and non-hydro renewables. Recently adopted punitive requirements for wind power development reaffirm our view and will dampen investor interest. As such energy policies will continue to drive a wedge between Poland and the EU over emissions and environmental targets.

Latest Updates And Structural Trends

While the share of coal-fired generation in the country's total energy mix is expected to downtick from 78.9% in 2015 to around 75.4% in 2025, Poland will remain overwhelmingly dependent on this fuel for power generation.

In late June 2016, the Polish President Andrzej Duda signed amendments to the Act on Renewable Energy Sources and Act on Windfarms, which notably reduce state support for the development of renewable energy and impose tight restrictions on new wind power developments.

As such, we hold our subdued growth forecast for Poland's non-hydro renewables generation. We now believe non-hydro renewables generation will average 3.4% expansion in the next 10 years, contributing 18.1% to the total power mix in 2025 (up from 15.6% in 2015).

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