

Romania Power Report Q1 2016

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Abstracts

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BMI View: This quarter we have downgraded our power forecasts for Romania to reflect our view that the completion of the country's flagship Cernavoda 3 and 4 reactors is unlikely before the end of our forecast period in 2024. Overall, the decision to exclude the Cernavoda reactors from our forecast has had a significant impact on our outlook for the Romanian power sector and means we expect the country to remain more reliant on coal and gas than previously anticipated. We forecast electricity generation will remain relatively flat - registering annual average growth of 0.9% between 2015 and 2024. Coal will remain the biggest component of the power mix, but gas will gain share as coal capacity is taken offline to comply with tightening EU emissions targets, and Romania boosts domestic gas production from the Black Sea towards the end of our forecast period.

Latest Updates And Structural Trends

A new government strategy for 2015-2025 highlights the increasingly decrepit state of much of Romania's electricity infrastructure. According to the report, many of the country's electric energy production capacities have gone beyond the technical life and are becoming wasteful and polluting. According to the government, the Oltenia and Hunedoara complex energy units are now on the brink of bankruptcy.

In January 2015, new regulations came into force which allow only energy traders who possess a license issued by Romania's energy regulation agency ANRE to import or export electricity. Under the new rules, energy suppliers can sell energy only to the final customers, while the traders can buy and sell energy on the central market or for export or import. The new law also prohibits energy

producers to import or export energy.

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