

Russia Power Report Q2 2016

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Abstracts

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BMI View: We expect very limited growth in Russian electricity generation, capacity and consumption over our forecast period to 2025. Our muted outlook for the market - one of the world's biggest - is based on severe macroeconomic headwinds and prolonged geopolitical uncertainty, which will take a toll on the economy and - by extension - the power sector.

Latest Updates And Structural Trends

The broader economic and political backdrop frames our views on the Russian power sector in 2016. The annexation of Crimea and perceived Russian belligerence towards the West has shattered investor confidence and will deter significant foreign investment. Meanwhile, global oil prices of below USD30/ bbl in early 2016 have made the government's budget assumptions untenable, which will necessitate further spending cuts. At the same time, tight credit conditions - exacerbated by international sanctions - will drag on economic growth.

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