

# Russia Power Report Q4 2016

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## Abstracts

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BMI View: Russia's power sector continues to suffer from the effects of an ongoing economic recession and sanction regime, a weakened currency, and low oil prices. Based on consequent subdued consumption levels paired with high investment uncertainty, we continue to expect muted growth for our ten-year forecast despite the country's rich resource endowment and size of its market.

### 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 between USD30/bbl in early 2016 and USD45/bbl in mid-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.

These Fiscal pressures in Russia appear to be accelerating the privatisation of stakes in state-owned companies, including state-owned oil giant Rosneft. That said, we are very sceptical that this will play out according to plan, given deep suspicion among the Russian population of privatisations following the experience of the 1990s, as well as the reluctance of President Vladimir Putin to relinquish control over strategic assets, and in particular at severely discounted valuations.

## Contents

### BMI Industry View

Table: Headline Power Forecasts (Russia 2015-2021)

### SWOT

### Industry Forecast

### Russia Snapshot

Table: Country Snapshot: Economic And Demographic Data (Russia 2015-2020)

Table: Country Snapshot: Economic and Demographic Data (Russia 2020-2025)

Table: Country Snapshot: Power Sector

### Russia Power Forecast Scenario

### Gas Generation And Capacity Forecast

Table: Russia's Energy Strategy 2030

### Electricity Generation And Power Generating Capacity

Table: Total Electricity Generation Data And Forecasts (Russia 2014-2019)

Table: Total Electricity Generation Data And Forecasts (Russia 2020-2025)

Table: Electricity Generating Capacity Data And Forecasts (Russia 2014-2019)

Table: Electricity Generating Capacity Data And Forecasts (Russia 2020-2025)

### Electricity Consumption

Table: Total Electricity Consumption Data And Forecasts (Russia 2014-2019)

Table: Total Electricity Consumption Data And Forecasts (Russia 2020-2025)

### Transmission & Distribution, Import And Export

Table: Electric Power T&D Losses Data And Forecasts (Russia 2014-2019)

Table: Electric Power T&D Losses Data And Forecasts (Russia 2020-2025)

Table: Trade Data And Forecasts (Russia 2014-2019)

Table: Trade Data And Forecasts (Russia 2020-2025)

### Industry Risk/Reward Index

### Russia Power Risk/Reward Index

### Rewards

### Risks

### Market Overview

### Key Policies And Market Structure

### Regulation And Competition

### Sustainable Energy Policies

### Pricing

### Russia Power Projects Database

### Competitive Landscape

### Federal Grid Company (FGC)

### Inter RAO UES

Gazprom Energoholding

EON

Enel

Company Profile

Inter RAO

EON (Unipro)

Regional Overview

Glossary

Table: Glossary Of Terms

Methodology

Methodology And Sources

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Power Risk/Reward Index Indicators

Table: Weighting Of Indicators

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