

# Saudi Arabia Power Report Q2 2016

<https://marketpublishers.com/r/S9EEF1A257DEN.html>

Date: April 2016

Pages: 59

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

ID: S9EEF1A257DEN

## Abstracts

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**BMI View:** The outlook for public spending on all but the most important power sector infrastructure is a strong headwind, with the Saudi government undertaking fiscal consolidation as it faces up to lower oil revenues. Delays and cancellations to the most ambitious and costly projects across all areas of the power sector remain the biggest risk to our forecasts as the kingdom rationalises spending. Upside risk comes from the strategic importance being placed on gas-fired generation.

Latest Trends And Developments:

The outlook for Saudi Arabia's economy has deteriorated as lower oil prices force the government to ramp up the pace of fiscal consolidation, as indicated by its 2016 budget. Given the power sector's reliance on government spending, this has by extension darkened our capacity and generation forecasts.

These conditions do not mean that the government will not spend on power infrastructure as it attempts to keep pace with surging electricity demand and diversify the oil-heavy power mix so as to preserve oil for export (rather than burning it domestically). It does, however, mean that certain projects - such as the Fadhili gas project - which are crucial to the Saudi energy sector will be realised while others will be delayed or cancelled.

We believe the more ambitious (and expensive) projects in the power sector - particularly new solar and nuclear capacity are particularly vulnerable to further delays.

One bright spot for potential investors is that we expect a bigger focus on

attempting to attract private investment into the power sector via public-private partnerships (PPPs) - in an effort to reduce the burden on the state.

Saudi Electric Company (SEC) is expected to be debundled into separate entities in 2016, with foreign investment sought once these have been created.

## Contents

### BMI Industry View

Table: Headline Power Forecasts (2014-2020)

### SWOT

### Industry Forecast

### Saudi Arabia Snapshot

Table: Country Snapshot: Economic and Demographic Data (Saudi Arabia 2015-2020)

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

Table: Country Snapshot: Power Sector

### Saudi Arabia Power Forecast Scenario

### Electricity Generation And Power Generating Capacity

Table: Saudi Arabia - Original 2032 Power Sector Targets (Now Pushed Back To 2040)

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

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

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

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

### Electricity Consumption

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

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

### Transmission & Distribution

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

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

### Industry Risk/Reward Index

### MENA Power Risk Reward Index

Table: MENA Power RRI

### Saudi Arabia Power Risk Reward Index

### Rewards

### Market Overview

### Key Policies And Market Structure

### Regulation And Competition

Table: IPP - Investment Opportunities

### Sustainable Energy Policies

### Saudi Arabia Power Projects Database

### Competitive Landscape

### Saudi Electricity Company (SEC)

### 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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