

Slovakia Power Report Q3 2016

<https://marketpublishers.com/r/SC65437F011EN.html>

Date: July 2016

Pages: 55

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

ID: SC65437F011EN

Abstracts

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BMI View: The medium term outlook for Slovakia's power sector is quite encouraging. With two new nuclear reactors set to come on stream in the next couple of years, our core scenario envisages that there will be a near 30% increase in total generating capacity by the end of 2018, relative to our core forecast for the end of 2016. After that, generation is likely to plateau, given the absence of any significant new projects in the pipeline, a possible modernisation of the Vojany thermal station aside. Consumption will remain subdued, at a maximum growth rate of 1.0% per annum. On a two-year view, there are downside risks to our generation forecasts. Slovakia's economy ministry revealed in May 2016 that a further hike in costs for the Mochovce project - to above even the previously revised figure of EUR4.6bn - was in the pipeline. The announcement came after a meeting between the economy ministry and SE. Meanwhile, a spokesperson for Enel told the Reuters newswire that a team was undertaking a fresh cost analysis of the project. These additional uncertainties - particularly, whether Slovakia's government would have the appetite (or even the capacity) to absorb a further hike in costs - provide significant downside risks to our core forecast that Mochovce will be fully online in 2018.

Latest Updates And Structural Trends

Investments in nuclear power mean we expect this sector to drive overall growth in the Slovak power industry, with nuclear power generation forecast to increase from 14.0TWh in 2015 to 21.1TWh in 2025, while total generation will increase from 25.0TWh to 32.6TWh.

Slovenské Elektrárne's (SE) work on the Mochovce Nuclear Power Plant is on course to result in reactor 3 coming onstream in Q416 or Q117 while reactor 4

should be complete a year later. Total power generation in Slovakia is therefore expected to increase substantially over the next couple of years, to 32.1TWh in 2018 (a rise of 29% over two years).

Consumption should accelerate from 2016 onwards, though annual growth will remain below 2%, which, combined with the improving generating capacity, will ameliorate the overall shortfall.

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