

Slovakia Power Report Q4 2016

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Abstracts

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BMI View: As units three and four of the Mochovce nuclear power plant come online, we forecast nuclear capacity to increase 17.5% in 2017 and 15.2% in 2018. The increased power capacity from these plants will contribute to an increase of total power generation capacity, which we forecast will grow by 7.4% in 2017 and 9.0% in 2018, for a total of 28.4TWh and 30.9TWh respectively. This will consolidate the dominance of nuclear power in the power mix. After those projects come fully online, growth is likely to plateau for the remainder of our forecast period, given that other major projects have either been mothballed or marred by slow approval processes.

Latest Updates And Structural Trends

In late June 2016, Slovenské elektrárne (SE) announced that it had completed construction at the third unit of Mochovce, enabling the testing phase to get underway, a process which initially involves primary circuit testing, ahead of so-called cold and hot hydrostatic tests of the reactor, including leak tightness checks. Meanwhile, SE further sought to reassure the market that the fourth unit was around 75% complete. Building in the timeline for testing, SE therefore confirmed that Unit 3 would be phased in during 2017, while Unit 4 would come online through the course of 2018.

Enel announced that it had successfully closed the first phase of its sale of SE - thereby offloading a 33% stake - in late July 2016. The sale of Enel's stake to EPH, a private company with Czech and Slovak energy assets, had been announced in December 2015, with two phases to the sale envisaged, on the basis of a preliminary price of EUR750mn. The first phase involved the disbursement of EUR150mn to Enel, with the fee for the remaining 33%

contingent upon the health of SE after the completion of the two new nuclear reactors at Mochovce.

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