

# Spain Power Report Q3 2016

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## Abstracts

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**BMI View:** The majority of Spanish power generation will be sourced from non-hydropower renewables and gas-fired power over our 10-year forecast period to 2025. Thermal power growth will come mainly from mothballed capacity being brought back online. Investment into new power sources - especially nonhydropower renewables - will be delayed as investors await clarity on policy direction on subsidies after the June 2016 national elections.

### Latest Updates And Structural Trends

We have revised our forecasts for coal generation in light of Red Eléctrica de España's latest annual report indicating coal-fired generation increased by 9 terawatt hours (TWh) between 2014 and 2015. We expect that this is a result of the Spanish coal industry being shielded until 2018, after which time 'ordered closures' will be enacted.

Spanish Energy Secretary Pedro Marín has stated that the government possibly intends to remove nuclear power plants as a generation option over the medium term. We note that this will have a marked impact on nuclear generation over our forecast period if this is implemented, however we await the results of the June 2016 national elections and an official government policy before removing any Spanish nuclear reactors from our forecasts.

Our forecasts for nuclear power generation remain unchanged since last quarter.

Our Country Risk team expect a grand coalition government to be formed after

the Spanish national election. The election will be held on June 26 2016, after the 2015 elections failed to produce a clear winner. We expect the resulting coalition to be mostly pro-renewable electricity, which will help improve the investment climate for non-hydropower renewables. However, until policy certainty is established, we expect investment will remain muted.

Red Eléctrica CEO Juan Lasala has stated that the transmission system operator will seek to increase interconnection capacity between Spain and the neighbouring countries of Spain and Portugal to 8,000 megawatts.

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