

Turkey Power Report Q4 2015

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Abstracts

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BMI View: We continue to expect Turkey to remain the most attractive power market in the CEE region this quarter. We foresee power demand in Turkey to be robust over the next decade, given the high levels of investment being channelled into its power sector, the country's capacity expansion plans and its improving economic outlook. There is also considerable political backing for power sector expansion as the government continues to strive for greater energy security and to lower the country's heavy reliance on imports of natural gas through expanding domestic capacity - with renewables and domestically sourced coal leading the way.

Yet, while the outlook is bright, the development of Turkey's power sector is complicated by the country's precarious economic and political position. The need to reduce its reliance on foreign capital, narrow external deficits and rebalance away from private consumption towards more domestic saving and investment will necessitate a period of slower growth. Although the government and central bank have clearly demonstrated an aversion to allowing rebalancing to play out through lower GDP growth rates in the medium term, we believe this is simply delaying the inevitable. Risks of a more pronounced and rapid fall in headline growth remain high in light of the deterioration in the global macroeconomic outlook for emerging markets that has seen investor confidence suffer and capital inflows dry up. As it stands, our country risk team forecast real GDP growth to be significantly slower over the next few years than the 9.0% average reading recorded in 2010-2011.

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