

# Venezuela Power Report Q4 2016

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## Abstracts

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**BMI View:** The outlook for Venezuela's beleaguered power sector has not improved this quarter, with widespread power outages, a consequence of a prolonged drought and heavy losses from ageing infrastructure, crippling the country and contributing to further social unrest and political uncertainty. While some hydropower output is reportedly coming back online over the coming months as water levels at the key Guri dam improve, overall we expect to see a sharp decrease in total electricity generation in 2016. Several new power plants are under development in the country, enhancing capacity over the medium term. However, the investment environment in Venezuela, where there is a history of state appropriation of assets and widespread corruption, will remain a deterrent to the much-needed large-scale development.

### Latest Updates And Structural Trends

Adding to the woes of Venezuela's power sector, workers at Corpoelec, the state-owned energy giant, are undertaking a widespread strike in early July, protesting at delays to the confirmation of a new collective agreement. The strike comes amid escalating public protests over food and medicine shortages while low oil prices, high inflation and a poor business environment will see Venezuela's recession stretch into its third year in 2016, and persist until 2018.

While the electricity rationing has ended, according to a July 2016 statement from Venezuelan President Nicolas Maduro, the electricity supply scenario remains in a precarious position. We are maintaining our current forecast for a 0.66% fall in total electricity generation over 2016, with an increase in thermal output failing to entirely compensate for the drop-off in hydropower generation.

In light of the weak economic environment, we do not expect to see any major investment in the power sector above the current, limited, project pipeline. As such we forecast only limited gains in total electricity capacity and generation over the course of the forecast period through to 2025, leaving Venezuela vulnerable to further supply shortages.

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