

# Brazil Oil and Gas Report Q3 2016

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## Abstracts

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**BMI View:** Brazil's vast pre-salt reserves suggest substantial growth potential over the long term, underpinning our bullish upstream view that crude, natural gas, and other liquids output will rise over the next decade. However, production growth will be limited by declining investment funds and continued headwinds from the corruption scandal and ongoing political crisis. As such, we maintain a relatively modest outlook, reflecting our view that the above-ground environment remains a considerable obstacle to the upstream and downstream segments due to weakening project economics, waning investor confidence, and a burdensome regulatory environment.

The key trends and developments in the Brazilian oil and gas sector are:

On May 12, Brazil's Senate joined the lower house, voting to open an impeachment trial for President Dilma Rousseff for alleged misuse of public funds. Brazil is set for a shift to more centrist policies with the ascendance of former vice president Michel Temer to the presidency. We expect that the Senate will ultimately vote to impeach Rousseff in the months ahead, ending 13 years of leftist Partido dos Trabalhadores (PT) rule, and paving the way for Temer to remain in power until new elections are held in 2018.

While early policy statements from Temer and his aides indicate upside for Brazilian growth over the next few years, staunch legislative opposition from Rousseff's PT, an ongoing impeachment trial and potential for substantial public pushback against cutting spending in the midst of a deep economic recession will likely stymie the pace of reform, including within the oil and gas sector.

Reports are surfacing that Brazilian officials plan to alter existing presalt

regulations in the coming weeks to encourage greater private investment in the oil sector. The new proposals would allow privately owned companies to operate production-sharing contracts (PSCs) in deepwater acreage, altering a key element of the Presalt Law passed in 2010. Producers other than national oil company (NOC) Petrobras will only be able to operate in the presalt if blocks are sold to combine operations with existing concessions that were signed prior to the passage of the 2010 law.

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