

Croatia Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Croatia's upstream oil and gas sector has benefitted from interest among international oil companies over recent quarters, however contested maritime boundaries and regulatory uncertainty due to opposition to hydrocarbons exploration remain key threats to the sector. A positive decision on the proposed Krk liquefied natural gas terminal would have a significant impact on the local sector, resulting in increased gas imports and strengthening Croatia's role as regional energy hub.

The main trends and developments in Croatia's oil and gas sector are:

In September 2015, the Croatian government announced it would delay signing contracts for licences won during previous bidding rounds until after elections in November. The delay demonstrates the political and regulatory challenges facing investors in Croatia, where public opposition to hydrocarbons development remains a key source of risk. Regardless of the outcome of the vote, even with support at the highest levels of government, growing environmental activism will leave the sector and investors vulnerable to further delay and disruption.

Onshore and offshore licensing rounds in 2014 and 2015 have attracted interest from international oil companies, and sustained upstream investment is necessary to reverse the current trend of declining reserves and production. However, in addition to environmental opposition, contested maritime boundaries present further obstacles to investment. The energy ministry confirmed that OMV and Marathon relinquished offshore blocks in response to a maritime boundary dispute with Montenegro.

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