

# Croatia Oil and Gas Report Q2 2016

<https://marketpublishers.com/r/CB2E6CD1C52EN.html>

Date: March 2016

Pages: 82

Price: US\$ 1,295.00 (Single User License)

ID: CB2E6CD1C52EN

## Abstracts

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BMI View: Croatia's new government is likely to impose new restrictions on offshore drilling amid growing domestic opposition stemming from concern for the environment and tourism sector. This, alongside ongoing maritime boundary disputes, creates additional uncertainty for investors in Croatia's oil and gas sector. Progress on the Krk liquefied natural gas terminal continues and a final investment decision was expected mid-2016; a positive decision would see Croatia emerge as a regional energy hub.

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

Prime Minister Tihomir Orešković, who took office in January 2016, has expressed doubts over offshore drilling due to environmental concerns. Amid a growing backlash against offshore exploration, there is growing uncertainty facing the industry. Orešković has backed onshore exploration, but new regulations, and possibly even a ban on drilling in the Adriatic, are possible, though the government policy remains unclear. In addition to environmental opposition, contested maritime boundaries present further obstacles to investment, as evidenced by OMV and Marathon's decision to relinquish blocks awarded during an offshore bidding round.

Uncertainty over the future of Croatia's nascent offshore oil and gas sector only reinforces the bearish prospects for reserves and production of both oil and gas. The absence of clarity on policy only exacerbates the impact of low oil prices, which will further discourage investment in Croatia's upstream sector, which is thought to have only modest upside potential.

Croatia confirmed receipt of seven bids for a proposed LNG import terminal on

Krk island. Officials indicated they hoped to make a final investment decision by mid-2016 and complete the project by 2019. Development of the terminal would position Croatia as a key source of alternative supply to imports of Russian gas. The project could also help to meet growing domestic demand for as domestic output continues to decline.

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