

# Gabon Oil and Gas Report Q4 2016

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## Abstracts

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BMI View: Gabon's oil sector remains vulnerable to the decline in global oil prices, with reports of delays to a key upstream project on the back of uncertain economic conditions. Continued upstream investment is indicative of the market's untapped potential, but above-ground worries ranging from industrial action to unattractive fiscal terms will remain obstacles to the sustained investment necessary to reverse declining reserves and output.

The main trends and developments we highlight for Gabon's oil and gas sector are as follows:

Our Country Risk team believes that outbreaks of violence across the Gabonese capital, Libreville, will not be enough to unseat re-elected President Ali Bongo. Bongo's victory in the August 27 presidential election is unlikely to be overturned, and they expect the unrest following the official results announcement, that has seen the burning of the parliament building and a raid on opposition headquarters, to calm in the coming days and weeks. Oil production should therefore not be impacted by the events, unless massive strike actions take place, something that has already taken place in the past within the industry.

Gabon rejoined OPEC in June 2016, becoming the 14th and smallest member of the group in terms of production.

In October 2015, Gabon launched its 11th licensing round. The round offers five deepwater blocks in the Gabon South basin: E12, E14, F12, F13 and G14. In March 2016, the licensing round was extended to allow for changes in the fiscal

terms on offer. In our view, Gabon will need to show substantial flexibility in its licensing in order to draw investment into its frontier deepwater and ultra-deepwater acreage.

Shell reported in April 2016 that it is looking to divest its onshore assets in Gabon, worth about USD700mn. Should a sale occur, this yields downside risk to our Gabon oil production forecast: Shell's assets notably include the Rabi Kounga and Gamba fields. We will wait to see whether the fields are sold and to whom before updating our forecast.

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