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Libya Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Despite continued progress in negotiations between the rival Libyan governments, the country's security and political outlook remains heavily clouded. This in turn will continue to dampen upstream production growth, due to the repeated targeting of oil and gas infrastructure; damage to wellhead, processing and export facilities; a lack of essential maintenance works; and chronic underinvestment in the sector. Exports will see a similarly slow recovery, with revenues further undercut by persistently low global commodity prices. The outlook on the downstream is equally bearish, with poor refining efficiencies and continued feedstock issues severely undermining overall utilisation rates.

Key Trends & Latest Updates:

> Piecemeal progress in the UN-brokered peace talks towards a Libyan unity government poses upside risk to our bearish oil and gas outlook. However, a polarised political scene and the deep fragmentation of the conflict will see insecurity remain an enduring feature of the country's operating environment over the coming years.
>
> Exploration will remain heavily curtailed across much of our forecast period due to continued instability and unattractive fiscal and licensing terms. However, we expect greater exploration in the prospective offshore plays. Ongoing instability in Libya affected production throughout 2015, and we expect this dynamic to continue into 2016. However, incremental improvements in the political and security outlook will support a y-o-y gain in crude and condensates output, averaging 517,000b/d.

Contents

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