

Poland Oil and Gas Report Q4 2015

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Abstracts

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BMI View: We have downgraded Poland's long-term gas production outlook, removing any contribution in growth from shale gas. The slow pace of exploration is unlikely to pick up in the coming years, tempering development of below-ground understanding and optimised drilling and hydraulic fracturing processes required for Poland's challenging geology. Conventional gas exploration and developments will slowly boost gas production over our forecast period.

The main trends and developments we highlight for Poland's oil and gas sector are:

We have downgraded Poland's long-term gas production outlook, removing any contribution in growth from shale gas. Exploration for unconventional gas in Poland has come to a near standstill and is unlikely to pick up within the next few years.

While we no longer include shale gas production in our Poland gas production forecast, we continue to highlight the potential of conventional gas exploration and the role it has in boosting Poland's output, as highlighted by San Leon's recent Rawicz discovery, to be developed within the next one to two years. Conventional developments in Poland will very slowly increase Poland's gas production over our forecast period.

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