

Slovenia Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Slovenia's upstream sector remains close to inexistent, with little to no oil or gas production within our forecast period. While there are glimmers of hope in gas segment attributed to the Ascentoperated Petišovci tight gas project, the initiative is facing continued regulatory and funding headwinds, thereby informing our modest upstream outlook. We acknowledge upside risk to our forecast in the event of its start-up, however, overall volumes are likely to be relatively modest, with imported Russian gas set to dominate supply for the foreseeable future.

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

There is evidence of commercial gas deposits close to the Hungarian border that can be exploited for power generation purposes. However, given project delays we do not include it within our reserves or production forecast. The country's upstream reserves remain extremely limited at the moment.

Slovenian natural gas production will remain limited over the course of our forecast period given the lack of upstream development in the country. While the long-delayed Petišovci project poses upside risk to our forecast, we maintain our more modest outlook given continued financial and regulatory delays associated with the initiative.

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