

Spain Oil and Gas Report Q4 2015

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Abstracts

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BMI View: Though we witnessed an uptick in upstream investment into conventional resources within Spain over the past several years, we expect domestic production of oil and gas will remain negligible. As such, we expect imports will meet approximately 99% of demand for the foreseeable future. Moreover, we believe prospects for onshore unconventionals will remain limited as significant technical, environmental and political obstacles preclude us from including further upstream development of shale gas resources within our forecast period.

A delay to a planned shale gas exploration programme by Repsol underscores the threat local bans on fracking pose to shale gas in Spain, despite its federal legalisation in 2013. Previous downside risk generated by regional bans has been cleared out by the Constitutional Court's June 2014 ruling.

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