

United Kingdom Oil and Gas Report Q1 2016

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Abstracts

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BMI View: While we see a provisional uptick in oil and gas production in the UK from 2015 onwards based on projects in the pipeline, the long-term trend remains one of stagnation given falling volumes from mature fields, a lack of significant new discoveries, falling oil prices and increasing exploration, production and operational costs in the region at a time when oil companies are seeking Capex cuts. While shale gas presents upside risk to gas production, this will not come online before the early 2020s at the earliest. Significant fiscal incentives put in place following the ongoing fiscal review provide some upside risk to our oil and gas production outlook past 2018/2019. However, further reforms and higher sustained oil prices will be necessary to realise this upside risk.

Exploration

The UK is set to see further decline in its oil and gas reserves, as high exploration, high operational costs and lower oil prices are limiting new exploration in the North Sea. While significant fiscal changes and development incentives were enacted early 2015, we highlight the introduction of specific exploration incentives is required to reincentivise exploration.

Shale gas exploration will remain subdued over the coming years in the UK, despite the award of shale exploration licenses and new measures to kick-start the industry. Low oil and gas prices are notably a large barrier to quicker progress over the coming years.

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