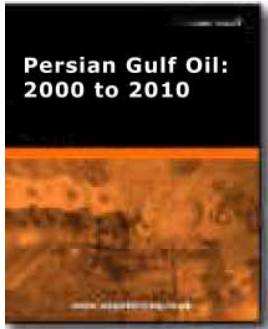


Persian Gulf 2001 to 2010: Implications for Oil Investors



The essential guide to foreign investment prospects in seven Persian Gulf oil-producing countries

Introduction

This report considers foreign investment prospects in seven Persian Gulf oil-producing countries in the period between 2001 and 2010. It examines local oil resources, oil development costs, oil development goals, political stability and likely modalities for co-operation with foreign oil companies. The countries examined are Iraq, Iran, Saudi Arabia, Kuwait, the UAE, Qatar and Oman.

The report finds that Iran and Iraq will likely constitute the preferred targets for foreign oil operations in the Persian Gulf by 2010 - but only if the prevailing economic sanctions against them can be removed. In the case of Iraq, this will mean American acquiescence in withdrawing support for the prevailing UN ban on investment in the Iraqi oil sector. Given the continuing American animus against the regime of Saddam Hussein, this is unlikely to happen while Saddam is still in power. In late 2001, there were no credible challenges to his authority.

In 2010, East Asia will continue to be the major market for Persian Gulf oil, accounting for a cumulative offtake of about 18.5m b/d. It will be followed by Europe, at about 6.5m b/d and the western hemisphere at about 2m b/d. Assuming continuing delays in the construction of pipeline infrastructure between new oil developments in Central Asia and southern Iran on the one hand and the Mediterranean Sea on the other, the Persian Gulf market share might well be higher in both East Asia and Europe. Notwithstanding the apparent willingness of BP-Amoco to participate in the construction of the Baku-Ceyhan pipeline, the prospects for the overall Central Asian oil export infrastructure were still unsettled in late 2001.

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