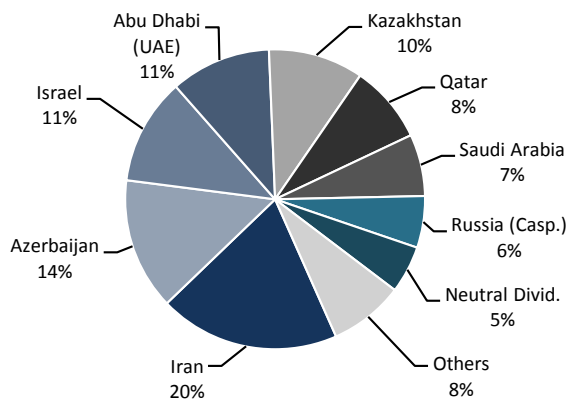


Infield Systems has just released the latest edition of its **Offshore Middle East & Caspian Oil and Gas Market Report To 2017**. This latest report provides a detailed forecast, including oil and gas capital expenditure projections and number of installations, for each of the main sectors in the offshore oil and gas industry, including: fixed platforms, floating production systems, subsea production units, pipelines and control lines; whilst also providing an overview of the demand and supply for vessels in the Middle East & Caspian region, as well as an assessment of potential deepwater activity.

Infield Systems forecasts a positive outlook for the Middle East & Caspian region over the next five years, with levels of expenditure projected to increase by more than 19%, and with Iran continuing to hold a leading market share, followed by Azerbaijan and Israel, both of which are anticipated to account for substantial offshore Capex increases compared to the previous five year period.

Despite its extensive wealth of oil and gas reserves, Iran remains the subject of debilitating international sanctions which have caused oil production to suffer dramatically, with a new round of unilateral sanctions targeting Iran's oil industry approved by both the EU and US during 2012. However, Infield Systems expects Iran to continue to invest, with its primary focus being the South and North Pars developments; which are expected to account for 47% of Iranian offshore Capex during the forecast. In development terms, Infield Systems currently expects a total of twenty fields to require Capex during the forthcoming five year period offshore Iran, with the pipeline market demanding the vast majority of this spend.



Middle East & Caspian Capex (%) by Country 2013-2017

Source: Infield Systems' Middle East & Caspian Oil & Gas Market Report to 2017

Azerbaijan is projected to account for increased levels of Capex over the next five years, derived mainly from the development of BP's Shah Deniz project. Phase two of the project is anticipated to require significant Capex relating to the development of two fixed platforms and 23 subsea production wells as well as other subsea infrastructure. June 2013 saw the Trans Adriatic Pipeline selected as the preferred transport route to deliver its Caspian Sea gas to south and central Europe, ahead of rival pipeline project Nabucco West.

Israel is another country expected to attract increased Capex, with Noble Energy's Leviathan and Tamar projects projected to account for 77% of the country's expenditure over the forecast. Within the Levantine Basin of the Eastern Mediterranean, prospective reserve additions have the potential to significantly alter the energy supply dynamic within the surrounding market and offering a greater diversification away from Russia's Gas supplies.

Abu Dhabi is anticipated to see reduced levels of investment over the forecast period in comparison to the last five years. Historically, there were a number of projects with high capital costs, such as the ADNOC, JODCO and ExxonMobil consortium's Upper Zakum 750K re-development project. Over the period 2008-20012, the project accounted for around 57% of the country's offshore Capex, however, the field will require around 80% less investment over the next five years.

Within Kazakhstan's sector of the Caspian Sea the main focus of expenditure is expected to be the ongoing Kashagan development; the extensive reserves have the potential to catapult Kazakhstan into becoming one of the region's top exporters before the end of the decade.

In terms of operators, Iran's increased demand for offshore oil and gas infrastructure is likely to result in the Iranian National Oil Company's levels of expenditure remaining high, although tough international sanctions placed on the country may play a significant role in holding back actual development. With the giant assets of Tamar and Leviathan, Noble Energy is expected to become one of the top spenders within the region over the forecast. Indeed, compared to the previous five year period, the US Independent is anticipated to witness its Capex requirement more than double.

BP is expected to retain a strong position, with the majority of its expenditure likely to be directed towards phase 2 of the Shah Deniz development offshore Azerbaijan. Indeed, the development is anticipated to be the most capital intensive project globally for the operator during the forthcoming five years.

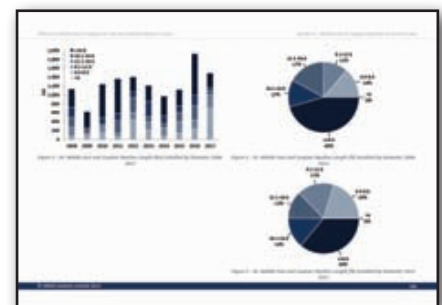
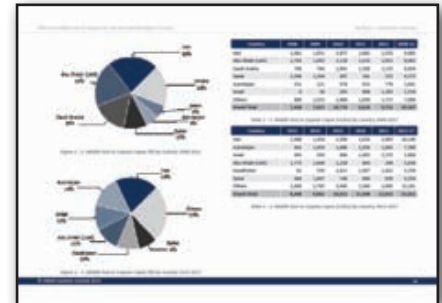
In terms of market share, Pipeline and control line Capex is expected to increase by around 22% over the forecast. Projects in Iran, Azerbaijan, Abu Dhabi, Qatar and Israel represent a large proportion of demand and are set to drive pipeline and control investments in the region.

The Subsea Completions market will also present emerging opportunities. Israel is anticipated to command the largest share of market Capex, with phase one of the deepwater Tamar project likely to dominate the country's subsea Capex. In Azerbaijan, BP's Shah Deniz (phase 2) field will have an extensive network of subsea infrastructure and thus is also expected to require fairly significant investment over the forecast.

With regards to water depth, Capex is split between shallow developments in Kazakhstan and the Persian Gulf and developments in the ultra-deep waters of the Eastern Mediterranean for Israel. 76% of the platforms likely to be developed over the forecast will be fixed. However, despite floating platforms only accounting for 24% of the region's platforms market, there will be a huge increase in projected spend, mainly driven by developments in Israel and Kazakhstan.

Report Contents

- **Executive Summary** provides an overview of the Middle East & Caspian offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the market.
- **Global Market Overview** provides an overview of current economic conditions in both developed and emerging markets, oil price trends and field sanction points, offshore production and reserves, as well as key industry trends, including the impact of unconventional and the growth of LNG on the global market.
- **Sector Analysis and Forecasts:**
 - **Fixed Platforms** provides an overview of the fixed platform market followed by a detailed discussion of key operators and developments. In-depth analysis of fixed platforms by country, by type (Piled, Jack-up, Gravity, Caisson, Conductor Supported), by water depth and by weight band is also provided.
 - **Floating Production Systems** contains a market overview as well as a detailed forecast for the FPS market, including Capex and number of installations by operator, by country, by type (FSO, FPSO, Other Floaters), by water depth and by build. Key developments are also discussed.
 - **Subsea** includes a sector overview as well as a detailed forecast for the Subsea market, including Capex and number of installations by operator, by country, by sector (Equipment, Drilling & Completion) and development type (Subsea Tree, Manifold), and by water depth. Key developments are also discussed.
 - **Pipelines and Control Lines** provides an overview of the sector and the key operators and developments. Further detailed analysis is then provided about pipelines by country, by market segment (Trunk/Export Lines, SURF, Conventional), by water depth, by material and by diameter, whilst control lines are reviewed by country and by type.
 - **Deep and Ultra-Deepwater** looks at the outlook for deepwater development in the region, including Capex projections by operator, by country and by sector (Platforms, Subsea, Pipelines and Control Lines). Key deepwater developments are also discussed.
 - **Specialist Vessels** provides in-depth forecasts for regional vessel demand (vessel days) and supply (units), including contract awards, for the major markets - Pipelay, Heavy Lift, Multifunctional (IRM, Construction Support) and Accommodation.



Why You Should Buy This Report

- The report contains data developed by Infield Systems' market modelling process, OFFPEX, which is based on a unique "bottom up approach" to forecasting. OFFPEX's component by component and project by project forecasting process is robust and has a proven track record.
- The reader is given a comprehensive presentation of the offshore market in the Middle East & Caspian region with commentary and detailed analysis covering the macro economic climate right through to analysis by country and operator in terms of both Capex and number of units forecast to be installed.
- Detailed sector analysis appraising the variances in regional and country drivers for the Middle East & Caspian offshore oil and gas market, providing insight into the trends expected within the market over the next five years.

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- Offshore LNG
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- Subsea Well Intervention
- Remotely Operated Vehicles
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- Latin America
- Middle East & Caspian
- North America

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- Defined Regions/Countries
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