

# CHAIN REACTION

The drive to increase local value in the oil and gas industry supply chains in the Gulf is set to become a major contributor to economic diversification and higher non-oil activity

## SAUDI ARAMCO



**\$3.4bn**

LOCAL MANUFACTURING  
SPEND, 2017

**\$414bn**

10-YEAR GAS  
INVESTMENT PROGRAMME

**70%**

IN-KINGDOM TOTAL VALUE-  
ADDED (IKTVA) TARGET  
SHARE BY 2021

**30%**

EXPORTS AS A SHARE  
OF OUTPUT BY 2021

## ABU DHABI NATIONAL OIL COMPANY



**\$4.9bn**

IN-COUNTRY VALUE (ICV)  
SPENDING, 2018

**\$132bn**

PLANNED INVESTMENT,  
2019-23

## PETROLEUM DEVELOPMENT OMAN



**\$3.7bn**

CONTRACT VALUE AWARDED  
TO LOCAL FIRMS IN 2015

**\$64bn**

EXPECTED INVESTMENT  
2013-20