

# O A P E C

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## OAPEC & GCC COUNCIL: SIGNING MOU ON PETROLEUM MEDIA STARTS NEW CHAPTER OF COOPERATION

**22<sup>ND</sup> INTERNATIONAL  
CONFERENCE ON PETROLEUM,  
MINERAL RESOURCES AND  
DEVELOPMENT**

**CONFERENCE ON IMPROVING  
THE PERFORMANCE OF  
DOWNSTREAM INDUSTRIES**



# The Cover



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# Contents

## IN THIS ISSUE

4

**EDITORIAL**

6

**OAPEC ACTIVITIES**

18

**PETROLEUM DEVELOPMENTS**

31

**TABLES ANNEX**

### ORGANIZATION OF ARAB PETROLEUM EXPORTING COUNTRIES (OAPEC)



The Organization of Arab Petroleum Exporting Countries (OAPEC) was founded on the basis of the agreement signed in Beirut, Lebanon on 9 January 1968 between the governments of Kingdom of Saudi Arabia, the State of Kuwait and the (then) Kingdom of Libya. The agreement stipulates that the Organization shall be domiciled in the City of Kuwait.

The principal objective of the Organization is the cooperation of the members in various forms of economic activity in the petroleum industry, the determination of ways and means of safeguarding the legitimate interests of its member countries in this industry, individually and collectively, the unification of efforts to ensure the flow of petroleum to its markets on equitable and reasonable terms, and providing appropriate environment for investment in the petroleum industry in member countries.

In 1970 the United Arab Emirates, the State of Qatar, the Kingdom of Bahrain and the Republic of Algeria joined the Organization, followed by the Syrian Arab Republic and the Republic of Iraq in 1972, Arab Republic of Egypt in 1973, then the Republic of Tunisia in 1982 (its membership was suspended in 1986). Any Arab country which derives a significant share of its national income from petroleum is eligible for membership in OAPEC upon the approval of three-quarters of the member countries, including all three founding members.



## 10 22<sup>ND</sup> INTERNATIONAL CONFERENCE ON PETROLEUM, MINERAL RESOURCES AND DEVELOPMENT



## 12 TOWARDS AN ACTIVE VISION ON JOINT ARAB ACTION



## 14 CONFERENCE ON IMPROVING THE PERFORMANCE OF DOWNSTREAM INDUSTRIES

### • OAPEC-Joint Ventures:

OAPEC has sponsored the creation of four companies: The Arab Maritime Petroleum Transport Company (AMPTC), established in 1972 with headquarters in Kuwait City, the Arab Shipbuilding and Repair Yard Company (ASRY) established in 1973 with headquarters in Bahrain, the Arab Petroleum Investments Corporation (APICORP) established in 1974 with headquarters in Khobar, Saudi Arabia, the Arab Petroleum Services Company (APSC) established in 1975 with headquarters in Tripoli, Libya.

### OAPEC'S ORGANS

The Organization carries out its activities through its four organs:

- **Ministerial Council:** The Ministerial Council is the supreme authority of the Organization, responsible for drawing up its general policy.
- **Executive Bureau:** The Executive Bureau is composed of one representative from each of the member countries, drawing recommendations and suggestions to the Council, reviewing the Organization's draft annual budget and submitting it to the Council, it also adopts the regulations applicable to the staff of the General Secretariat. The resolutions of the Executive Bureau are issued by the majority of two-thirds of all members.
- **General Secretariat:** The General Secretariat of OAPEC plans, administers, and executes the Organization's activities in accordance with the objectives stated in the agreement and directives of the Ministerial Council. The General Secretariat is headed by the Secretary General. The Secretary General is appointed by resolution of the Ministerial Council for a tenor of three years renewable for similar period(s). The Secretary General is the official spokesman and legal representative of the Organization and is accountable to the Council. The Secretary General directs the Secretariat and supervises all aspects of its activities, and is responsible for the tasks and duties as directed by the Ministerial Council. The Secretary General and all personnel of the Secretariat carry out their duties in full independence and in the common interests of the Organization member countries. The Secretary General and the Assistant Secretaries General possess in the territories of the Organization members all diplomatic immunities and privileges.
- **Judicial Tribunal:** The protocol of the Judicial Tribunal was signed in Kuwait on 9 May 1978 and came into effect on 20 April 1980. The Tribunal is competent to consider all disputes related to the interpretation and application of OAPEC's establishment agreement, as well as disputes arising between two or more member countries concerning petroleum operations.



## OAPEC & GCC COUNCIL: SIGNING MOU ON PETROLEUM MEDIA STARTS NEW CHAPTER OF COOPERATION

OAPEC Secretariat General started a new era of constructive cooperation with the GCC Council's Secretariat General through the signing of an MoU on Petroleum Media. HE Abbas Al Naqi, representing OAPEC, and HE Dr Abdullatif Al Zayyani, representing the GCC Council, signed the MoU on Tuesday 19 March 2019 at OAPEC headquarters in Kuwait.

The MoU signing crowns 3-year-long efforts and talks between the two sides. It came in recognition of the current developments in the media, especially the petroleum media, in the age of social media that affects public opinion trends in all walks of life, including oil, gas, and energy. The current scene ignited the need for further cooperation to keep in pace with the new international media and develop the current media rhetoric, as well as, boost the media presence at Arab and international platforms to free the Arab petroleum industry from stereotyping and spread accurate information and data on the Arab petroleum industry, especially the member countries of these two Arab regional organisations.

The MoU project had the full and direct support of HE Al Zayyani and HE Al Naqi as the petroleum media experts' committee meetings have been hosted in rotation between the two organisations. This has resulted in establishing a strong basis and agreeing an appropriate mechanism for media cooperation and expertise exchange.

The goals of this project aim at contributing to highlighting the bases for maintain the petroleum resources and using them in the most ideal way since they represent the main source of national income in most Arab countries. These resources also form the solid base for economic and social development thus maintaining them requires the cooperation of everyone including media as it is the main communication channel with the public. Another goal is to highlight the member countries' efforts (from both organisations) to maintain the stability of the international petroleum market and boost economic development to serve the interests of the peoples of these countries and the world.

The MoU goals are realistic and doable. They stem mainly from the will of both sides to face media challenges in the Arab petroleum industry, in addition to realising the importance of joint action to convey the required message by supporting unified efforts.

An important goal, among others, is developing the skills of those working in the Arab petroleum media through organising workshops, seminars, and conferences, as well as, exchanging visits and expertise, allocating excellence awards and launching joint media campaigns and creating networks for easier communication between expertise in the member countries. This is in addition to improving libraries and database exchange and promoting the activities of both sides.

The close bilateral ties between OAPEC and the GCC Council represent a unique pattern of constructive cooperation between the Arab joint action organisations. The story behind it goes back to when the GCC Council was first launched in 1981. These long years witnessed organising various joint seminars, workshops, exchanged visits, and continued coordination on energy, environment, and climate change issues in collaboration with other concerned organisations.

Both organisations' member countries have many shared values and similarities including history, future prospects, customs and traditions, significant geographic loca as well as, a number of similarities in economic legislations and administrative systems. This goes hand in hand with essential reliance on oil and gas industry as a main economic pillar and source of national income.

Having witnessed the signing of the petroleum media MoU, OAPEC Secretariat General would extend sincere thanks to HE Al Zayyani for his visit to our headquarters and hopes to create the atmosphere for executing the clauses of this MoU within the framework of developing the Arab petroleum industry.



# OAPEC & GCC COUNCIL SIGN MOU ON PETROLEUM MEDIA





**OAPEC Secretariat General and the GCC Council's Secretariat General signed an MoU on Petroleum Media. HE Abbas Al Naqi, representing OAPEC, and HE Dr Abdullatif Al Zayyani, representing the GCC Council, signed the MoU on Tuesday 19 March 2019 at OAPEC's headquarters in Kuwait.**





## HE AL NAQI: MOU SIGNING STARTS NEW PHASE OF CONSTRUCTIVE COOPERATION BETWEEN GCC COUNCIL & OAPEC

The MoU stems from a mutual desire between the two organisations to boost bilateral relations and activate the petroleum media role in order to agree a common vision on regional and international developments in the petroleum industry. The MoU is based on the petroleum media strategy approved by the GCC Higher Council’s 33rd round (December 2012).

The target of the MoU is to put a framework for petroleum media cooperation between the two sides, as well as, exchange expertise, information, and reports in this respect. It also aims at coordinating during international forums in line with both sides’ regulations.

The two sides will cooperate in preparing joint research studies on petroleum media, exchange expertise and visits, information, and reports and collaborate for active participation in international forums.

There will also be training cooperation for petroleum media staff and journalists through joint specialised workshops and the organisation of regional and international



conferences for petroleum media experts.

On information and social media, it was agreed to link the two sides’ databases and coordinate on websites, as well as, activate the role of social media channels by defending the stance of member countries and promoting their relevant media activities.

On his part, HE Al Naqi lauded the signing of the MoU with the GCC Council considering it a start of a new phase of fruitful cooperation between the two sides.



He added that the two organisations will work together to fulfil various joint media goals which should highlight the strategic and pivotal role of the petroleum industry in our member countries. Al Naqi clarified “we will work together to safeguard our petroleum interests and refute rumours and



inaccurate information and news on the petroleum industry usually promoted by foreign press and social media.”

He added that bilateral relations between OAPEC and the GCC Secretariat Generals have always been strong and genuine ever since they started from the infant years of the GCC Council when it was established in 1981. He said the ties are still very close especially on media, economy, statistics, training, environment and climate change

issues. Al Naqi said since that date there have been many exchanged high-level official visits; as well as, various technical seminars, and experts’ meetings. He added that 5 Arab GCC countries are members in both OAPEC and the GCC council.

HE Al Naqi concluded by praising the huge efforts of the GCC Petroleum Media Committee and those in charge at OAPEC’s Press and Library Department that resulted in the signing of the MoU.



## 22<sup>ND</sup> INTERNATIONAL CONFERENCE ON PETROLEUM, MINERAL RESOURCES AND DEVELOPMENT

OAPEC Secretariat General took part in the “22nd International Conference on Petroleum, Mineral Resources and Development” held by the Egyptian Petroleum Research Institute (EPRI) in Cairo, Egypt, on 26-28 February 2019, under the auspices of Egypt’s Minister of Petroleum and Mineral Resources HE Engineer Tarek El Molla, in the presence of OAPEC Secretary General HE Abbas Al Naqi and EPRI’s Acting Director HE Dr Yasser Mostafa. Various petroleum issues have been tackled at the conference.

In the opening session, HE El Molla pointed out that the Egyptian petroleum sector is building up an ambitious strategy to fulfil “Egypt’s 2030 Vision” to utilize natural resources for achieving sustainable development goals. He added that the ongoing project on upgrading and developing the Egyptian petroleum sector is progressing towards tangible fruitful results in: attracting investments; supporting youth careers to assume leading duties (in order to boost the development of natural resources); in addition to maximising the resources added-value.

He drew the attention to recent unprecedented results in the petroleum industry in Egypt, on top of which: halting LNG imports and self-sufficiency (through the growing domestic production from significant discoveries in the past two years), which should

help Egypt starting to export the surplus.

The minister also stressed the importance of modern technology in developing the petroleum industry and the necessity of linking scientific research with the petroleum industry to keep in pace with the latest in exploration, drilling, production, and to improve the petroleum products’ quality to be more feasible economically.

It is worth mentioning that the conference importance stems from the topics it tackled including: developing the energy sector to contribute to the country’s development plan; building a competitive diverse economy; and the Afro-Egyptian partnership to underscore the Egyptian role in Africa.

Conference president and EPRI’s Acting Director Dr Yasser Mostafa said in his speech that the conference is an annual scientific

forum that gathers an elite of scientists and expert researchers in various aspects to discuss the most important global scientific research studies. He added that it provides a platform for discussions between experts and officials, decision makers, industry and production businessmen to come up with time-bound recommendations followed up for execution by a permanent conference secretariat that also informs all relevant authorities in the country in order to contribute to the development process in Egypt.

He stressed that EPRI has a future vision in line with Egypt's 2030 Vision on sustainable development and the country's scientific research strategy that relies on creativity, knowledge, good-planning, and linking scientific research to the petroleum industry's needs.

He clarified that maximising the benefit out of scientific research and patents via transforming them into outcomes represent the economic pillar of EPRI. This is in addition to research departments, EPRI's specific-purpose centres, and the projects that EPRI provides to the petroleum, industrial, and civil sectors.

On his part, OAPEC Secretary General HE Abbas Al Naqi gave a speech at the opening session thanking the organisers for the invitation. He pointed out that the conference comes at a time when the global petroleum industry is witnessing some kind of stability as a result of a relative improvement in oil prices recently. This has reflected on the future projects' forecasts in the Arab countries and the world in spite of some difficulties in global markets and certain geographical spots. HE Al Naqi pointed out that there have been different levels of activities in the Arab petroleum



industry, adding that Arab countries enjoy a prestigious status on the global energy map, most importantly in terms of hydrocarbons (oil and gas), supported by their large proven reserves which they use to export to the world. He then mentioned some global petroleum indicators and the role of Arab countries in them.

HE Al Naqi concluded by stressing that the purpose of these vital projects in the Arab countries is not only to diversify national income, maximise the benefits of available resources, and create new job opportunities, but also to achieve the sustainable development's social, economic, and environmental aspects in line with the growing global interest in achieving the sustainable development 2030 goals, especially goal number 7 ensuring everyone gets modern, reliable, and sustainable energy at affordable costs.

OAPEC Secretariat General has contributed with a paper on the "Role of Partnership between National and Global Petroleum Companies in Improving Downstream Industries in OAPEC Member Countries" by Dr Samir Al Kareish, Director of the Technical Department. The paper tackled challenges facing downstream industries (refining and petrochemicals) that call for enormous cooperation between national and global companies, for example in terms of strict regulations on environment, occupational safety, and working in a complex and difficult workplace.



# CONFERENCE ON THE EFFICIENCY OF OIL & GAS & RELEVANT INDUSTRIES IN THE ARAB COUNTRIES: TOWARDS AN ACTIVE VISION ON JOINT ARAB ACTION

OAPEC Secretary General HE Abbas Al Naqi took part in the Conference on the “Efficiency of Oil & Gas & Relevant Industries in the Arab Countries: towards an active vision on joint Arab action,” held in Cairo, Egypt, on 6-7 March 2019 under the auspices of His Excellency the Arab League Secretary General, in the presence of a large number of officials from Arab countries and organizations. The conference was co-organized by The Arab Administrative Development Organization (ARADO) and Arab Industrial Development and Mining Organization and the League of Arab States (LAS).

The event aimed at exchanging Arab expertise in oil, gas, and relevant industries, especially petrochemicals and fertilizers, as well as, discussing mechanisms for executing more bilateral and regional Arab action projects through reviewing successful examples of cooperation between Arab countries

and benefitting from them by studying their positive sides to boost them and negative sides to reduce them.

Key topics discussed in the conference included:

- Joint Arab action in oil, gas, and relevant industries vs international economic challenges (future vision)
- Future projects and opportunities
- Success stories of bilateral and regional joint Arab action projects



- Prospects of future knowhow-based industries in the Arab region

HE Al Naqi took part as a keynote speaker in the opening session and presented a paper on “the Role of Arab Organisations in the Nations’ Economy” which tackled the role of OAPEC in terms of joint Arab action and boosting economic growth in the member countries. This is in addition to showcasing its endeavours in securing energy resources needed by global economies to support their economic growth.



## 6<sup>TH</sup> SESSION OF UNECE GROUP OF EXPERTS ON GAS

OAPEC took part in the UNECE Group of Experts on Gas on 25 –26 March 2019, Geneva, Switzerland. Representatives of the UNECE, European Commission, and various international organisations including The International Gas Union (IGU), Gas Exporting Countries Forum, International Association of Oil and Gas Producers, the International Group of Liquefied Natural Gas Importers (GIIGNL), GIE, and international oil companies’ experts, as well as, academics participated in the event.

OAPEC Secretary General HE Abbas Al Naqi gave a speech at the opening session along with Mr Scott Foster, Director, Sustainable Energy Division, UNECE, and Mr Francesco di la Flore, Chief UN Gas Experts Group. HE Al Naqi reviewed the most significant gas industry indicators in the Arabian region, stressing the pivotal role played by gas in achieving sustainable development goals, especially goal number 7 on sustainable energy, and goal number 8 on sustainable economic growth. He underscored the importance of gas in supporting economic ties between Arab and European countries.

HE Al Naqi concluded his speech by stressing that natural gas enjoys a good status in comparison to other energy resources, and it is eligible to play a pivotal role in the future energy system due to its high efficiency, availability (in various areas),

and compliance with environmental goals and regulations.

On their part, Mr Foster and Mr di la Flore lauded the participation of HE Al Naqi and his speech that gave important messages on the role of gas in the Arab region’s sustainable development and in boosting EU-Arab ties.

Engineer Wael Hamed A. Moati, Gas Industries’ Expert from OAPEC, presented a paper at the event on “Current and Future Trends of Sustainable Natural Gas and LNG Production in the Arab Countries” at Day 2 session titled “Update on Activities in ECE Member States, Gas Industry and Organizations.” The paper tackled the gas and LNG production boom in Arab countries, measures on exploiting natural gas resources and raising production rates sustainably, as well as, current projects on LNG sustainability.

Engineer Moati also represented OAPEC at a workshop on 27 March 2019, organised by the UN, GIE, and MARCOGAZ on “Managing Methane Emissions in Gas Sector.” He presented a paper on the “LNG Sector in Arab Countries: Qatar’s Jetty Boil Off Gas Treatment” tackling liquefaction development in the Arab countries, their share in global LNG markets, and a case study on Qatar’s globally unique Ras Laffan jetty boil off gas treatment project, worth \$1 billion of investments.



## CONFERENCE ON IMPROVING THE PERFORMANCE OF DOWNSTREAM INDUSTRIES



OAPEC, in collaboration with Japan Cooperation Centre Petroleum (JCCP), organised a conference on “Improving the Performance of Downstream Industries”, under the auspices of HE Dr Khaled Al Fadhil, Kuwait’s Minister of Oil and Minister of Electricity and Water, who delegated HE Sheikh Talal Al Athbi Al Sabah, Oil Ministry’s Acting Undersecretary, to inaugurate the conference.

The conference aimed at exchanging expertise on improving operational and economic performance of the refining and petrochemicals industries, as well as, highlighting the role of scientific research and development in empowering these industries to face challenges.

The event was attended by refining and petrochemicals experts from a number of member

countries, JCCP, Japanese companies, KISR, Egyptian Petroleum Research Institute (EPRI), KOC, KNPC, ADNOC, Cairo University (Engineering Faculty), and OAPEC Secretariat General and other regional and international organisations.

### Opening Session

HE Sheikh Talal Al Athbi Al Sabah, Oil Ministry’s



Acting Undersecretary, inaugurated the conference welcoming the participants. He stressed Kuwait's huge keenness on improving petroleum industries in general, especially downstream industries through the execution of a group of projects of strategic nature like the clean fuel and Al Zour projects.

He expressed appreciation for OAPEC's active role in developing the Arab oil and gas industry through organising such events that provide a platform for exchanging views and visions among oil and gas experts from Arab and non-Arab countries.

He concluded his speech by renewing thanks to OAPEC, JCCP, and KISR's Petroleum Research and Studies Centre for organising this event wishing the conference all success.

HE Takashi Ashiki, Ambassador of Japan to the State of Kuwait, followed by delivering a speech in which he expressed Japan's recognition and appreciation of OAPEC's efforts and achievements in supporting and encouraging the development of the petroleum industry to ensure that oil

reaches markets at fair prices and conditions. He also praised Kuwait's role in securing petroleum supplies to the global market, especially Japan.

In his speech, HE Tsuyoshi Nakai, CEO of Japan Cooperation Centre Petroleum (JCCP), underscored the importance of the cooperation between OAPEC and JCCP on developing the petroleum industry and supporting scientific research.

He pointed out to the fruitful cooperation that resulted in various success stories while stressing the importance of the continuation of this cooperation to serve the interests of both sides. He thanked OAPEC for their efforts in organising the conference and rendering it successful.

OAPEC Secretary General HE Abbas Al Naqi gave a speech in which he said "This conference is held at a time when the petroleum industry is facing various challenges and hurdles, on top of which volatility of crude oil prices globally- in spite of their relative stability around fixed rates, in addition to increasing burdens resulting from meeting international environmental legislations, and other factors that affect the global petroleum markets."

He added that OAPEC member countries have been working on developing the petroleum industry in general, with a particular focus on refining and petrochemicals. This is done through developing existing facilities in these countries and building new ones equipped with the latest technologies to contribute to the development of the industry and boost its competitiveness so that they become one of the most important hubs for exporting high quality petroleum and





petrochemical products to international markets.

The Secretary General also underscored the important developments in the petrochemicals industry in the member countries in the past two decades. He pointed out to the keenness of OAPEC members on cooperating with global international companies with advanced technology by establishing joint ventures and cooperating in scientific research and development.

He concluded his speech by thanking their excellencies the ministers of petroleum, oil, and energy in OAPEC member countries for responding to the invitation by participating with large numbers of technical specialists in this conference. Al Naqi also extended thanks to all participating authorities, institutions, speakers and participants, for their presence and contributions. He lauded and thanked all members of the organising committee at OAPEC Secretariat General, JCCP, and KISR for their efforts in preparing for and organising this conference.

At the end of the opening ceremony, HE Al Naqi handed out trophies to HE Sheikh Talal Al Athbi, Oil Ministry's Acting Undersecretary and the Minister's representative, HE Takashi Ashiki, Ambassador of Japan to the State of Kuwait; HE Tsuyoshi Nakai, CEO of Japan Cooperation Centre Petroleum (JCCP); and Dr Abdul Atheem Maarafi on behalf of Dr Mina Maarafi the Head of KISR's Petroleum Research and Studies Centre, in recognition of their efforts in organising and supporting the conference activities. Also, souvenirs have been exchanged between the conference organisers and sponsors.

### Conference Key Topics

The conference consisted of 5 sessions spread over 2 days. Day 3 was allocated for field visit at KISR's Petroleum Research and Studies Centre. 20 specialised papers were presented at the technical sessions on:

- Overview on the refining industry in the Arab countries and the world
- Downstream industry challenges in the Arab countries and the world
- Measures for improving operational performance in downstream industries
- Success factors for projects on improving operational performance in downstream industries
- Role of scientific research in improving operational performance and profitability in downstream industries
- Practical examples on achieving operational excellence in downstream industries
- Role of scientific research in improving the performance of the refining and petrochemicals industries
- Case studies of successful refining and petrochemicals development projects

### Technical Papers

Dr Samir Al Kareish, Director of OAPEC's Technical Affairs Department, opened the first technical session by summing up the conference goals, importance, and key topics. OAPEC presented 3 technical papers, the first by Dr Al Kareish on the status quo of the refining and petrochemicals industry in the Arab countries in terms of refining

and production capacities compared to other parts of the world. Engineer Emad Mekki, Senior Refining Expert, presented the second paper on the “Operational Performance of the Arab Refining Industry” while the third was presented by Dr Yasser Al Baghdadi, Petroleum Industries’ Expert, on “Remapping Global Petrochemicals and its Implications for OAPEC Members.”

In the same vein, the JCCP presented 4 technical papers and KISR’s Petroleum Research Centre presented 5 papers. Egypt’s former Petroleum Minister HE Eng. Usama Kamal presented a paper on “Energy and Sustainable Development” while the President of Cairo University Professor Fatima Ashour presented a paper on environmental studies and mitigating risks in scientific research. EPRI Director Dr Yasser Mostafa presented a paper reviewing a case study on the desulfurization of petroleum products by using cheap Nano Polymers to cut the costs of refineries operations and boost profitability.

Engineer Anoud Taher from ADNOC’s Refining Research Centre presented a paper on ADNOC’s experience in reducing energy consumption through maximising the performance of the water steam grid at the company’s oil refineries. Engineer Rima Al Awadhi presented a paper on behalf of Kuwait Oil Company (KOC) on “Improving Projects’ Performance through Knowledge Exchange.”

### Conclusions & Recommendations

- Modern technology is one of the most important factors for empowering refining and petrochemicals industries to face challenges and improve performance
- Strategic planning a main factor in the success of executing operational performance improvement programs
- According to practical experiments, refineries using performance improvement programs do make significant progress in improving their competitiveness in global markets
- Committing to regular and pre-emptive maintenance programs for petroleum equipment contributes to reducing emergency halts that lead to loss in production
- New technologies and inventions contribute to improving production efficiency in refining and petrochemicals
- The importance of boosting expert cooperation, coordination and exchange in performance and productivity improvement between oil



refineries, Arab and international research centres and oil companies.

### Closing session

Dr Kareish reviewed the most important ideas and recommendations discussed during the conference sessions. He then thanked the sponsors and supporting organisations, as well as, the active taskforce from inside and outside OAPEC for their role in making the conference a successful event.

Mr Takaya Suzuki, Deputy GM of Technical Cooperation at JCCP, then spoke thanking all the speakers at the technical sessions and lauding the high quality of the papers presented at the conference. He hoped that the cooperation between JCCP and OAPEC will continue in the future.

### Field visit

A field visit to KISR’s Petroleum Research and Studies Centre took place on day 3 of the conference. A presentation was given on the centre’s goals, activities, and achievements. The participants also had a tour in the place to have a look at the various departments and equipment, as well as, at the mini pilot refinery simulator for a closer experience of working at refineries.



## Petroleum Developments in the World Market and Member Countries\*

### 1. Oil Market

#### 1. Prices

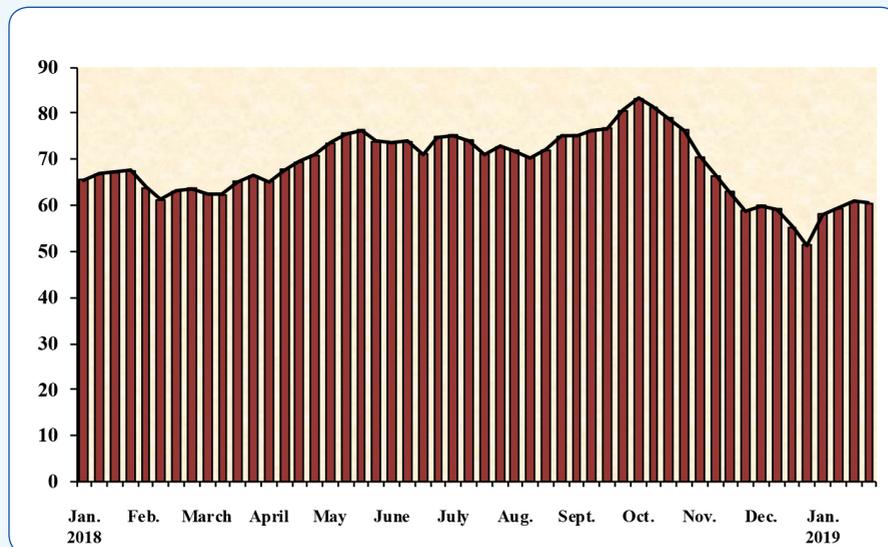
##### 1-1 Crude Oil Prices

Weekly average price of OPEC basket increased during the first week of January 2019, to reach \$58/bbl, and continue raise thereafter to reach its highest level of

\$60.8/bbl during the third week, then decline to reach \$60.5/bbl during the fourth week shown in **figure 1**:

On monthly basis, OPEC Reference Basket in January 2019, averaged \$58.7/bbl, representing an increase of \$1.8/bbl or 3.2% comparing with previous month, and a decrease of \$8.2/bbl or 12.2% from the same month of previous year. Lower supply from (OPEC+) Countries and signs of high conformity to the Declaration of Cooperation, as well as firm crude oil demand, particularly from Asia Pacific, were major stimulus for the increase in oil prices during the month of January 2019.

**Figure - 1** Weekly Average Spot Price of the OPEC Basket of Crudes 2017 - 2018 (\$/bbl)



#### Key Indicators

- *In January 2019, OPEC Reference Basket increased by 3.2% or \$1.8/bbl from the previous month level to stand at \$58.7/bbl.*
- *World oil demand in January 2019, decreased by 0.6% or 0.6 million b/d from the previous month level to reach 99.8 million b/d.*
- *World oil supplies in January 2019, decreased by 0.8% or 0.8 million b/d from the previous month level to reach 100.4 million b/d.*
- *US tight oil production in January 2019, increased by 1.3% to reach about 8 million b/d, whereas US oil rig count decreased by 1 rig from the previous month level to stand at 952 rig.*
- *US crude oil imports in December 2018, decreased by 1.7% from the previous month level to reach 7.5 million b/d, and US product imports decreased by 0.2% to reach about 1.8 million b/d.*
- *OECD commercial inventories in January 2019 increased by 13 million barrels from the previous month level to reach 2876 million barrels, and Strategic inventories in OECD-34, South Africa and China increased by 1 million barrels from the previous month level to reach 1828 million barrels.*
- *The average spot price of natural gas at the Henry Hub decreased in January 2019 to reach \$3.11/million BTU.*
- *The Price of Japanese LNG imports in December 2018 increased by \$0.3/m BTU to reach \$11.2/m BTU, whereas the Price of Korean LNG decreased by \$0.2/m BTU to reach 11/m BTU, and the Price of Chinese LNG imports remained stable at the same previous month level of \$8.5/m BTU.*
- *Arab LNG exports to Japan and Korea were about 3.606 million tons in December 2018 (a share of 19.7% of total imports).*

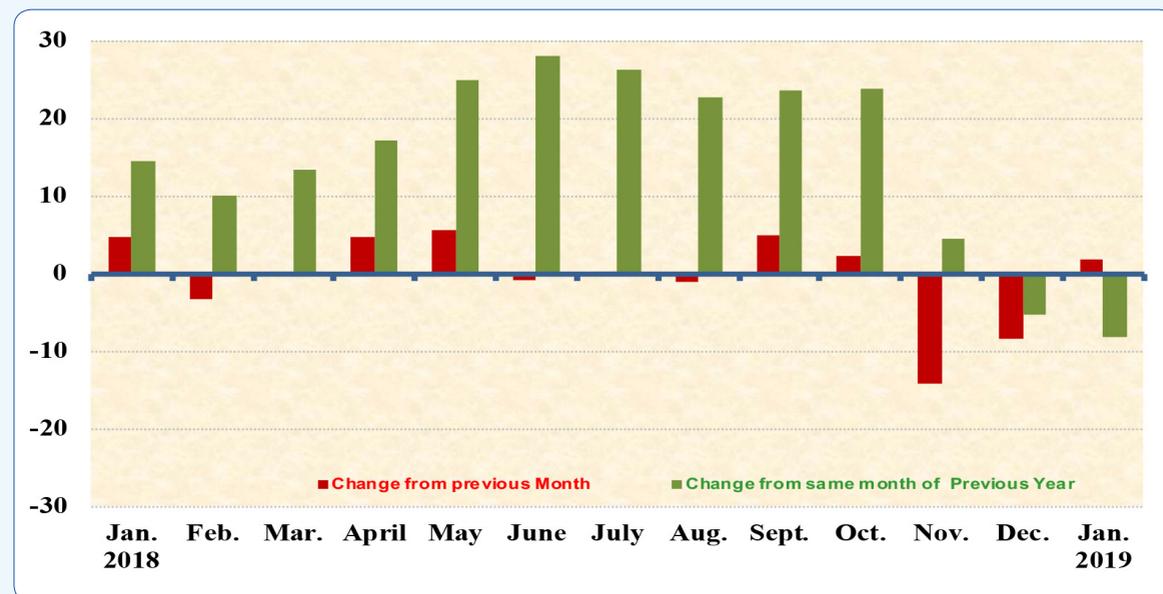
\* Prepared by the Economics Department.

**Table (1)** and **figure (2)** show the change in the price of the OPEC basket versus last month and the corresponding month of last year:

	Jan. 2018	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan. 2019
OPEC Basket Price	66.9	63.5	63.8	68.4	74.1	73.2	73.3	72.3	77.2	79.4	65.3	56.9	58.7
Change From previous Month	4.8	-3.4	0.3	4.7	5.7	-0.9	0.1	-1.0	4.9	2.2	-14.1	-8.4	1.8
Change from same month of previous Year	14.5	10.1	13.4	17.1	24.9	28.0	26.4	22.7	23.7	23.9	4.6	-5.2	-8.2

\* Effective June 16, 2005 OPEC replaced its seven-crude basket with one comprised of eleven crudes, one from each member country (weighted according to production and exports to major markets). Effective 1 January and mid of October 2007, Angola's Girassol and Ecuadorian Oriente crudes have been incorporated to become the 12th and 13th crudes comprising the new OPEC Basket. As of Jan., 2009, the basket excludes the Indonesian crude. As of Jan. 2016, the basket price includes the Indonesian crude. As of July 2016, the basket price includes the Gabonese crude. As of Jan. 2017, the basket excludes the Indonesian crude. As of June 2017, the basket price includes the Equatorial Guinean crude "Zafiro". As of June 2018, the basket includes the Congolese crude "Djeno". As of January 2019: The basket price excludes the Qatari crude "Qatar Marine".

**Figure - 2** Change in the Price of the OPEC Basket of Crudes, 2018-2019 (\$/bbl)



**Table (3)** in the annex show spot prices for OPEC basket and other crudes for the period 2017-2019.

## 1-2 Spot Prices of Petroleum Products

### - US Gulf

In January 2019, the spot prices of premium gasoline increased by 1.4% or \$0.9/bbl comparing with their previous month levels to reach \$63.2/bbl, spot prices of gas oil increased by 4% or \$2.7/bbl to reach \$70.2/bbl, and spot prices of fuel oil increased by 6.4% or \$3.3/bbl to reach \$54.9/bbl.



**- Rotterdam**

The spot prices of premium gasoline in January 2019, increased by 0.9% or \$0.6/bbl comparing with their previous month levels to reach \$68.2/bbl, spot prices of gas oil increased by 0.8% or \$0.6/bbl to reach \$75.2/bbl, and spot prices of fuel oil increased by 3.4% or \$1.8/bbl to reach \$54.9/bbl.

**- Mediterranean**

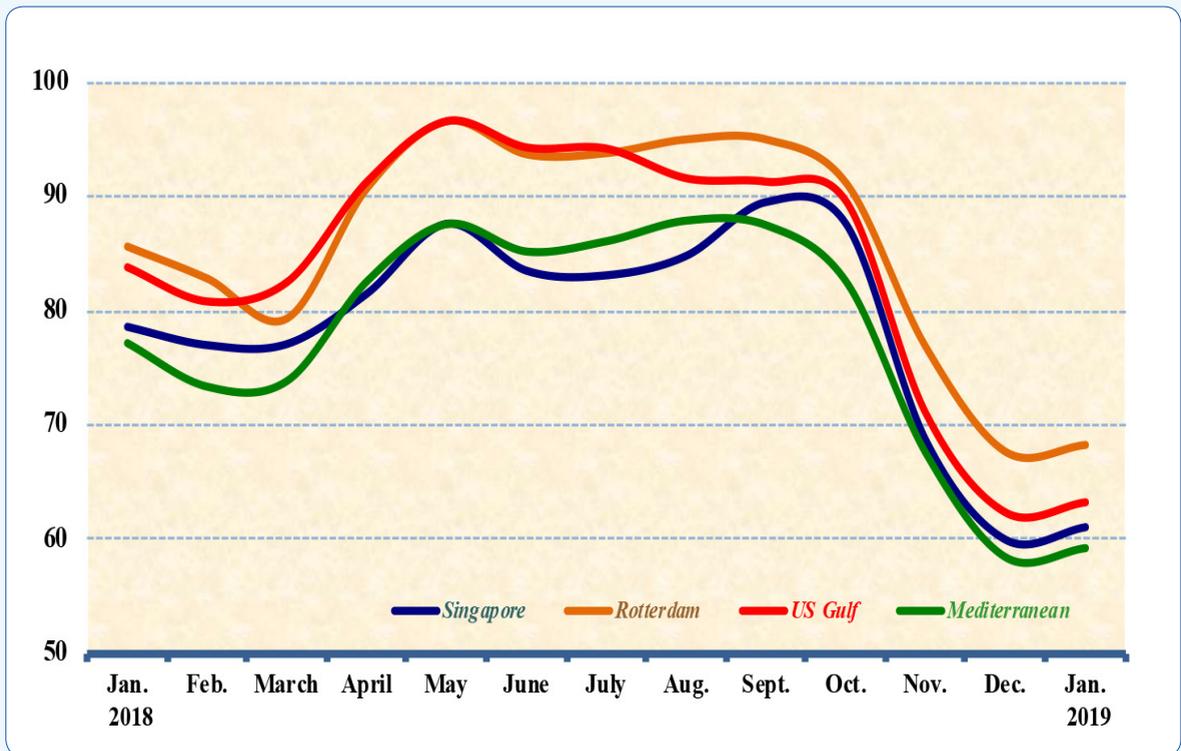
The spot prices of premium gasoline increased in January 2019, by 1.4% or \$0.8/bbl comparing with previous month levels to reach \$59.2/bbl, spot prices of gas oil increased by 2.3% or \$1.7/bbl to reach \$74.9/bbl, and spot prices of fuel oil increased by 5.9% or \$3.2/bbl to reach \$57.8/bbl.

**- Singapore**

The spot prices of premium gasoline increased in January 2019, by 1.8% or \$1.1/bbl comparing with previous month levels to reach \$61.1/bbl, spot prices of gas oil increased by 3% or \$2.1/bbl to reach \$72/bbl, and spot prices of fuel oil increased by 2.5% or \$1.4/bbl to reach \$57.8/bbl.

**Figure (3)** shows the price of Premium gasoline in all four markets from January 2018 to January 2019.

**Figure - 3** Monthly Average Spot Prices of Premium Gasoline, 2018-2019 (\$/bbl)



**Table (4)** in the annex shows the average monthly spot prices of petroleum products, 2017-2019.

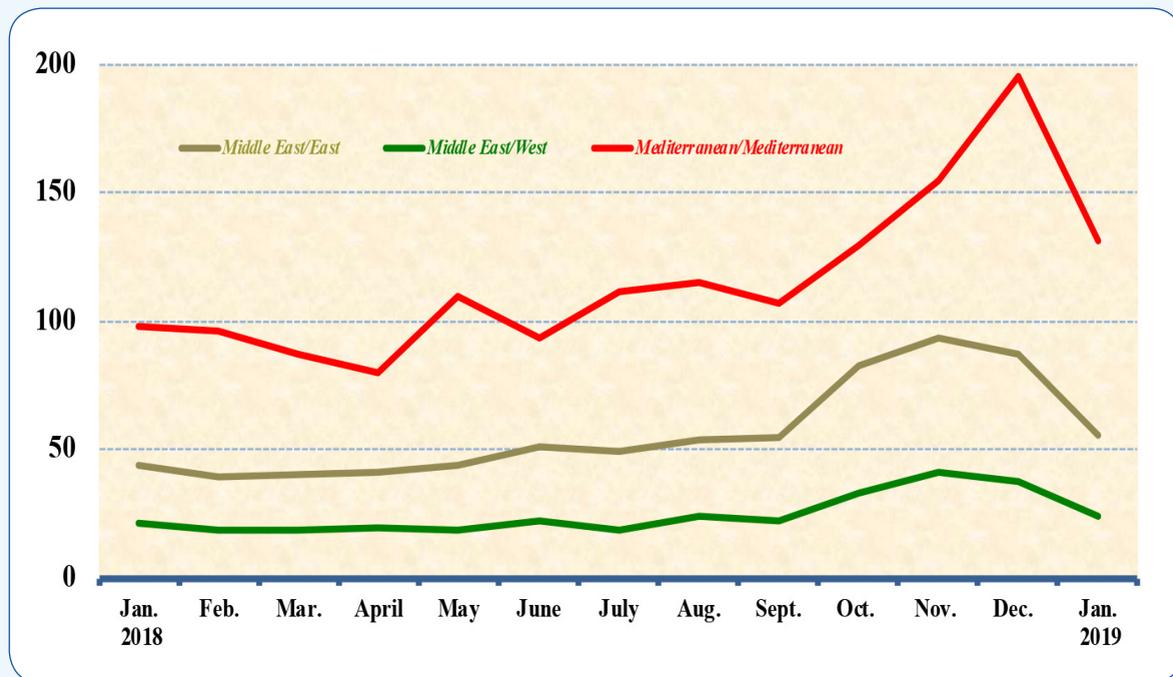
### 1-3 Spot Tanker Crude Freight Rates

In January 2019, Freight rates for crude oil for tanker size (230-280 thousand deadweight tons (dwt)), leaving Middle Eastern ports to the East, decreased by 31 points or 35.6% comparing with previous month to reach 56 points on the World Scale (WS\*).

And freight rates for crude oil for tanker size (270-285 thousand deadweight tons (dwt)), leaving Middle Eastern ports to the West, decreased by 14 points or 36.8% comparing with previous month to reach 24 points on the World Scale (WS), freight rates for inter - Mediterranean for small to medium sized tankers (80-85 thousand deadweight tons (dwt)), decreased by 64 points or 32.8% comparing with previous month to reach 131 points on the World Scale (WS).

**Figure (4)** shows the freight rates for crude oil to all three destinations from January 2018 to January 2019.

**Figure - 4** Monthly Spot Crude Oil Tanker Freight Rates, 2018 -2019 (World Scale)\*



\* World Scale is a method for calculating freight prices. One point for the WS means 1% of the standard price of freight in the direction in the WS book, which is published annually by the World Scale Association. The book contains a list of prices in the form of US dollar per ton, called "World Scale 100," for all the major routes in the world.

### 1-4 Spot Tanker Product Freight Rates

In January 2019, monthly spot Tanker freight rates for petroleum products [for tanker size 30-35 thousand deadweight tons (dwt)], leaving Middle Eastern ports to the East, decreased by 36 points, or 19.7% comparing with previous month to reach 147 points on WS.



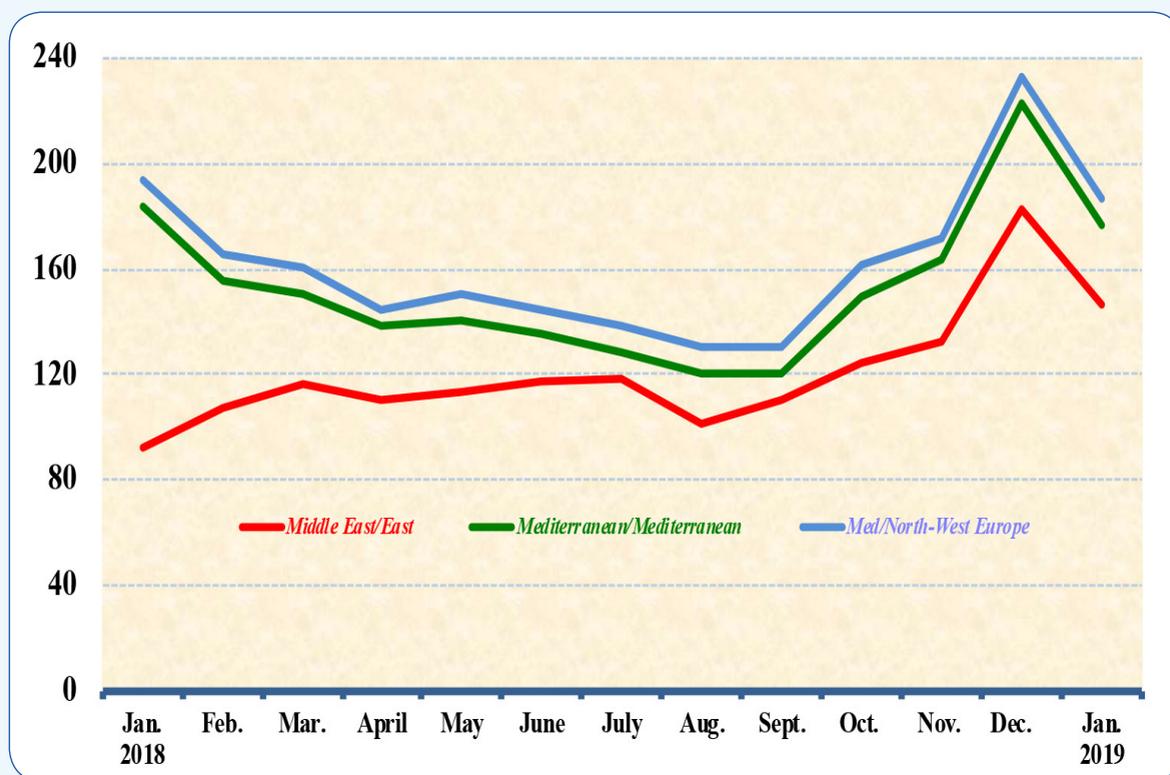
And Freight rates for Petroleum Products across Mediterranean [for tanker size 30-35 thousand deadweight tons (dwt)], decreased by 46 points, or 20.6% comparing with previous month to reach 177 points on WS, freight rates for petroleum products [for tanker size 30-35 thousand deadweight tons (dwt)], leaving Mediterranean to North-West Europe decreased by 46 points, or 19.7% comparing with previous month to reach 187 points on the World Scale (WS).

**Figure (5)** shows the freight rates for oil products to all three destinations from January 2018 to January 2019.

**Figure - 5**

**Monthly Spot Product Tanker Freight Rates, 2018 -2019**

(World Scale)



**Table (5)** and **(6)** in the annex show crude and products Tankers Freight Rates, 2017-2019.

## 2. Supply and Demand

Preliminary estimates in January 2019 show a decrease in world oil demand by 0.6% or 0.6 million b/d, comparing with the previous month level to reach 99.8 million b/d, representing an increase of 1 million b/d from their last year level.

Demand in OECD countries decreased by 2.5% or 1.2 million b/d, comparing with the previous month level to reach 47.4 million b/d, representing an increase of 0.2 million b/d from their last year level. Whereas demand in Non-OECD countries increased by 1.4% or 0.7 million b/d comparing with their previous month level to reach 52.5 million b/d, representing an increase of 0.9 million b/d from their last year level.

On the supply side, preliminary estimates show that world oil supplies for January 2019 decreased by 0.8% or 0.8 million b/d, comparing with the previous month to reach 100.4 million b/d, representing an increase of 2.8 million b/d from their last year level.

In January 2019, OPEC crude oil and NGLs/condensates total supplies decreased by 1.6% or 0.6 million b/d, comparing with the previous month to reach 36.2 million b/d, representing a decrease of 0.8 million b/d from their last year level. And preliminary estimates show that Non-OPEC supplies decreased by 0.3% or 0.2 million b/d, comparing with the previous month to reach 64.2 million b/d, representing an increase of 3.6 million b/d from their last year level.

Preliminary estimates of the supply and demand for January 2019 reveal a surplus of 0.7 million b/d, compared to a surplus of 0.8 million b/d in December 2018 and a shortage of 1.3 million b/d in January 2018, as shown in **table (2)** and **figure (6)**:

**Table 2** World Oil Supply and Demand (Million b/d)

	January 2019	December 2018	Change from December 2018	January 2018	Change from January 2018
<i>OECD Demand</i>	47.4	48.6	-1.2	47.2	0.2
<i>Rest of the World *</i>	52.5	51.8	0.7	51.6	0.9
<i>World Demand</i>	<b>99.8</b>	<b>100.4</b>	<b>-0.6</b>	<b>98.9</b>	<b>1.0</b>
<i>OPEC Supply :</i>	<u>36.2</u>	<u>36.8</u>	<u>-0.6</u>	<u>37.0</u>	<u>-0.8</u>
<i>Crude Oil</i>	30.6	31.3	-0.7	31.6	-0.1
<i>NGLs &amp; Cond.</i>	5.6	5.5	0.1	5.4	0.2
<i>Non-OPEC Supply</i>	61.8	62.0	-0.2	58.2	3.6
<i>Processing Gain</i>	2.4	2.4	0.0	2.4	0.0
<i>World Supply</i>	<b>100.4</b>	<b>101.2</b>	<b>-0.8</b>	<b>97.6</b>	<b>2.8</b>
<i>Balance</i>	<b>0.7</b>	<b>0.8</b>		<b>-1.3</b>	

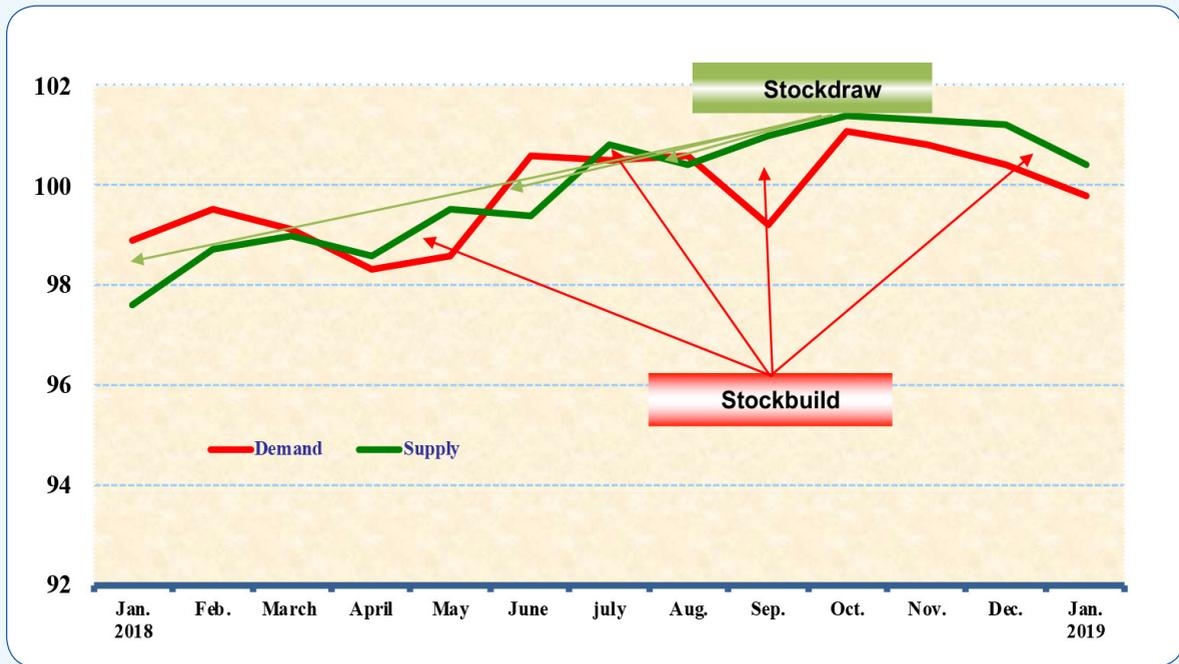
Source: Energy Intelligence Briefing Feb. 19, 2019.

\* include 0.2 million b/d of oil needed to fill up the supply system for crude and products, and strategic reserves.



**Figure - 6** World Oil Supply and Demand

(Million b/d)



Tables (7) and (8) in the annex show world oil demand and supply for the period 2017-2018.

**US tight oil production**

In January 2019, US tight oil production increased by 102 thousand b/d or 1.3% comparing with the previous month level to reach 8 million b/d, representing an increase of 1.7 million b/d from their last year level. The US oil rig count decreased by 1 rig comparing with the previous month level to reach 952 rig, a level that is 132 rig higher than last year, as shown in table (3) and figure (7):

**Table 3** US tight oil production\*

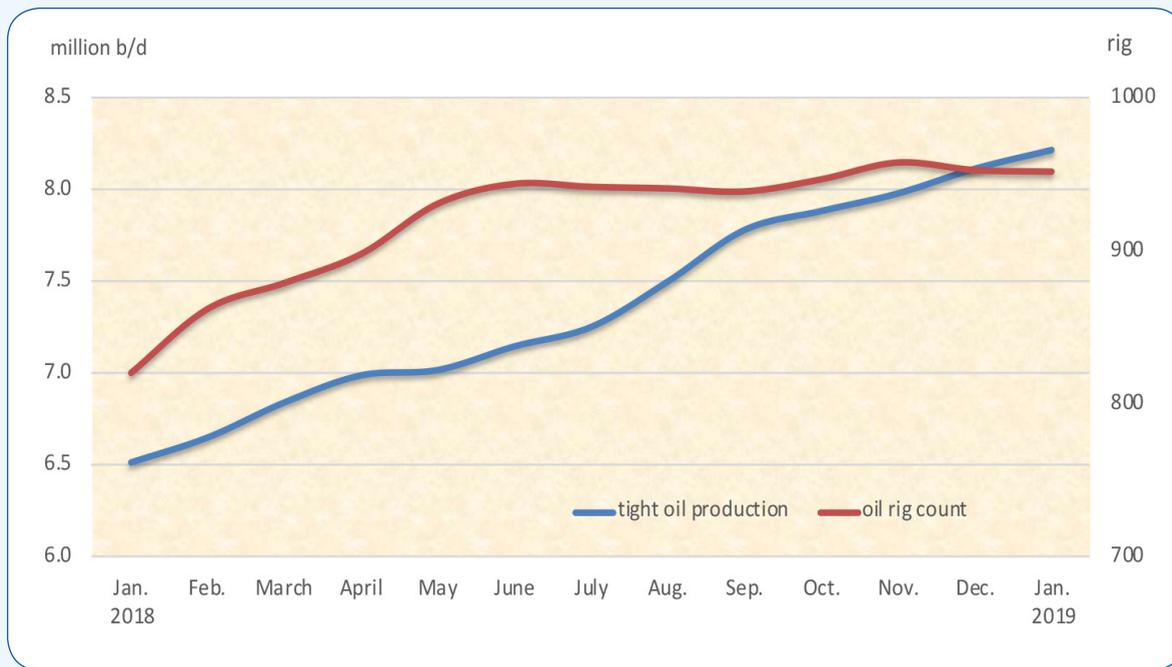
(Million b/d)

	January 2019	December 2018	Change from December 2018	January 2018	Change from January 2018
<i>tight oil production</i>	8.233	8.121	0.102	6.517	1.706
<i>Oil rig count (rig)</i>	952	953	(1)	820	132

Source: EIA, Drilling Productivity Report for key tight oil and shale gas regions, February 2019.

\* focusing on the six most prolific areas, which are located in the Lower 48 states. These six regions accounted for 92% of domestic oil production growth during 2011-2014, Bakken, Eagle Ford, Haynesville, Niobrara, Permian, Appalachia (Utica and Marcellus), in addition to Anadarko region which become the target of many producers in the recent years, as of July 2017, there are 129 operating rigs in the Anadarko region.

**Figure - 7 US tight oil production and oil rig count**



### 3. Oil Trade

#### USA

In December 2018, US crude oil imports decreased by 131 thousand b/d or 1.7% comparing with the previous month level to reach 7.5 million b/d. And US oil products imports decreased by 3 thousand b/d or 0.2% to reach about 1.8 million b/d.

On the export side, US crude oil exports increased by 35 thousand b/d or 1.5% comparing with the previous month level to reach 2.4 million b/d, and US products exports increased by 133 thousand b/d or 2.5% to reach 5.6 million b/d. As a result, US net oil imports in December 2018 were 303 thousand b/d or nearly 20.1% lower than the previous month, averaging 1.2 million b/d.

Canada remained the main supplier of crude oil to the US with 54% of total US crude oil imports during the month, followed by Saudi Arabia with 11%, then Mexico with 7%. OPEC Member Countries supplied 31% of total US crude oil imports.

#### Japan

In December 2018, Japan's crude oil imports decreased by 125 thousand b/d or 4% comparing with the previous month level to reach 3 million b/d. And Japan oil products imports (except LPG) decreased by 65 thousand b/d or 9% comparing with the previous month to reach 664 thousand b/d.

On the export side, Japan's oil products exports increased in December 2018, by 60 thousand b/d or 10.9% comparing with the previous month, averaging 611 thousand b/d. As a result, Japan's net oil imports in December 2018 decreased by 250 thousand b/d or 7.6% to reach 3 million b/d.

Saudi Arabia was the big supplier of crude oil to Japan with a share of 43% of total Japan crude oil imports, followed by UAE with 25% and Qatar with 10% of total Japan crude oil imports.



### China

In December 2018, China’s crude oil imports decreased by 123 thousand b/d or 1% comparing with the previous month level to reach 10.3 million b/d. Whereas China oil products imports increased by 19 thousand b/d comparing with the previous month to reach 1.3 million b/d.

On the export side, China crude oil exports decreased in December 2018, by 65 thousand b/d comparing with the previous month, averaging 7 thousand b/d. Whereas China oil products exports increased by 301 thousand b/d or 25% comparing with the previous month, averaging 1.5 million b/d. As a result, China’s net oil imports in December 2018 decreased by 348 thousand b/d or 3.3% to reach 10.1 million b/d.

**Table (4)** shows changes in crude and oil products net imports/(exports) in December 2018 versus the previous month:

**Table 4** USA, Japan and China Crude and Product Net Imports / Exports ( Million bbl/d)

	Crude Oil			oil Products		
	December 2018	November 2018	Change from November 2018	December 2018	November 2018	Change from November 2018
USA	5.015	5.181	-0.166	-3.811	-3.675	-0.137
Japan	2.995	3.120	-0.125	0.054	0.179	-0.125
Japan	10.331	10.397	-0.066	-0.195	0.087	-0.282

Source: OPEC Monthly Oil Market Report, various issues 2018.

## 4. Oil Inventories

In January 2019, OECD commercial oil inventories increased by 13 million barrels to reach 2876 million barrels – a level that is 10 million barrels higher than a year ago. It is worth mentioning that during the month, commercial crude inventories in OECD increased by 15 million barrels to reach 1101 million barrels, whereas commercial oil products inventories decreased by 2 million barrels to reach 1775 million barrels.

Commercial oil inventories in Americas increased by 9 million barrels to reach 1535 million barrels, of which 616 million barrels of crude and 919 million barrels of oil products. And Commercial oil Inventories in Europe increased by 19 million barrels to reach 942 million barrels, of which 336 million barrels of crude and 606 million barrels of oil products. Whereas Commercial oil inventories in Pacific decreased by 15 million barrels to reach 399 million barrels, of which 149 million barrels of crude and 250 million barrels of oil products.

In the rest of the world, commercial oil inventories increased by 9 million barrels to reach

2957 million barrels, whereas the Inventories at sea decreased by 23 million barrels to reach 1186 million barrels.

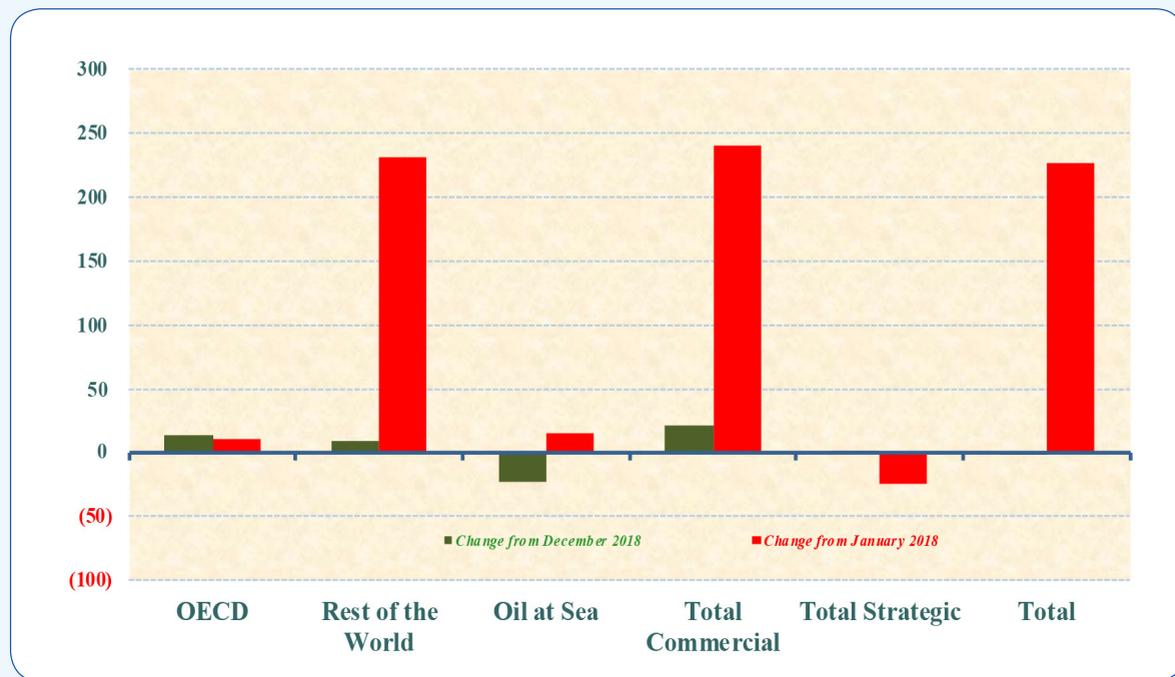
As a result, Total Commercial oil inventories in January 2019 increased by 22 million barrels to reach 5833 million barrels – a level that is 241 million barrels higher than a year ago.

Strategic inventories in OECD-34, South Africa and China increased by 1 million barrels to reach 1828 million barrels – a level that is 24 million barrels lower than a year ago

Total world inventories, at the end of January 2019 were at 8841 million barrels, representing a decrease of 1 million barrels comparing with the previous month, and an increase of 227 million barrels comparing with the same month a year ago.

**Table (9)** in the annex and **figure (8)** show the changes in global inventories prevailing at the end of January 2019.

**Figure - 8** Changes in Global Inventories at the End of January 2019 (Million bbl)



## II. The Natural Gas Market

### 1- Spot and Future Prices of Natural Gas in US market

The monthly average of spot natural gas price at the Henry Hub in January 2019 decreased by \$0.9/ million BTU comparing with the previous month, to reach \$3.11/ million BTU.



The comparison, shown in **table (5)**, between natural gas prices and the WTI crude reveal differential of \$5.8/ million BTU in favor of WTI crude.

**Table 5** Henry Hub Natural Gas and WTI Crude Average Spot Prices, 2017-2018 (\$/ Million BTU<sup>1</sup>)

	Jan. 2018	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan. 2019
<i>Natural Gas</i> <sup>(2)</sup>	3.9	2.7	2.7	2.8	2.8	3.0	2.8	2.9	3.0	3.3	4.1	4.1	3.1
<i>WTI Crude</i> <sup>(3)</sup>	11.0	10.7	10.8	11.4	12.1	11.7	12.2	11.7	12.1	12.2	9.8	8.5	8.9

1. British Thermal Unit.

2. Henry Hub spot price.

3. WTI – West Texas Intermediate Crude oil price, in dollars per barrel, is converted to dollar per million BTU using a conversion factor of 5.80 million BTU/bbl.

Source: <http://www.eia.gov/dnav/ng/hist/rngwhhdM.htm>

## 2- LNG Markets in North East Asia

The following paragraphs review the developments in LNG Markets in North East Asia, concerning prices and Japanese, Chinese and South Korean imports of LNG and their sources, and Spot LNG Exporters Netbacks.

### 2.1. LNG Prices

In December 2018, the price of Japanese LNG imports increased by \$0.3/million BTU comparing with the previous month to reach \$11.2 million BTU, whereas the price of Korean LNG imports decreased by \$0.2/million BTU comparing with the previous month to reach \$11/ million BTU, and the price of Chinese LNG imports remained stable at the same previous month level of \$8.5/ million BTU.

### 2.2. LNG Imports

Total Japanese, Korean and Chinese LNG imports from various sources, increased by 12.2% or 1.991 million tons from the previous month level to reach 18.278 million tons.

**Table (6)** shows the prices and quantities of LNG imported by Japan, South Korea, and China for the period 2016-2018.

**Table6 LNG Prices and Imports: Korea, Japan, and China 2016-2018**

	Imports (thousand tons)				Average Import Price (\$/million BTU)		
	Japan	Korea	China	Total	Japan	Korea	China
<b>2016</b>	<b>82767</b>	<b>33257</b>	<b>26017</b>	<b>142041</b>	<b>6.9</b>	<b>6.9</b>	<b>6.5</b>
<b>2017</b>	<b>83630</b>	<b>37657</b>	<b>38286</b>	<b>159573</b>	<b>8.1</b>	<b>8.0</b>	<b>7.3</b>
January 2017	8302	4294	3436	16032	7.5	7.9	7.0
February	7790	3600	2372	13762	7.9	8.0	7.0
March	8143	3527	1991	13661	7.7	7.8	6.9
April	6573	2337	2171	11081	8.2	7.8	7.0
May	6239	2488	2911	11638	8.5	8.3	7.3
June	6185	3460	3038	12683	8.3	7.8	7.1
July	6817	2716	3121	12654	8.3	7.9	7.4
August	7259	2603	3140	13002	8.3	8.2	7.4
September	5821	2368	3454	11643	8.1	8.1	7.2
October	6137	2760	3567	12464	7.8	8.1	7.4
November	6411	3328	4056	13795	7.9	7.7	7.7
December	7953	4176	5029	17158	8.1	8.3	8.1
<b>2018</b>	<b>82852</b>	<b>44300</b>	<b>53945</b>	<b>181097</b>	<b>10.0</b>	<b>10.1</b>	<b>8.5</b>
January 2018	8263	4144	5184	17591	8.7	8.7	8.4
February	8294	4588	3993	16875	9.2	9.9	8.6
March	7934	4304	3254	15492	9.5	9.4	8.7
April	5608	3217	3254	12079	9.4	9.3	8.7
May	6407	2784	4150	13341	9.6	9.8	8.5
June	5547	3758	4000	13305	9.8	9.8	8.5
July	6813	2746	4150	13709	9.8	10.0	8.5
August	7575	2920	4710	15205	10.2	10.2	8.5
September	6274	3358	4370	14002	10.6	10.8	8.5
October	6538	3795	4600	14933	10.9	11.1	8.5
November	6345	3952	5990	16287	10.9	11.2	8.5
December	7254	4734	6290	18278	11.2	11.0	8.5

Source: World Gas Intelligence various issues.



### 2.3. Sources of LNG imports

Australia was the big supplier of LNG to Japan and Korea with 3.527 million tons or 29.4% of total Japan and Korea LNG imports in December 2018, followed by Qatar with 21.3% and Malaysia with 12.3%.

The Arab countries LNG exports to Japan and Korea totaled 3.606 million tons - a share 19.7% of total Japanese and Korean LNG Imports during the same month.

### 2.4. LNG Exporter Netbacks

With respect to the Netbacks at North East Asia markets, Russia ranked first with \$8.29/million BTU at the end of December 2018, followed by Indonesia with \$8.02/million BTU then Malaysia with \$7.96/million BTU, and Australia with \$7.87/million BTU. LNG Qatar's netback reached \$7.39/million BTU, and LNG Algeria's netback reached \$6.68/million BTU.

**Table (7)** shows LNG exporter main countries to Japan, South Korea, and China and their netbacks at the end of December 2018.

**Table7** LNG Exporter Main Countries to Japan, Korea and China, And Their Netbacks\* at The End of December 2018

	Imports (thousand tons)			Spot LNG Netbacks at North East Asia Markets (\$/million BTU)
	Japan	Korea	Total	
<b><u>Total Imports, of which:</u></b>	<b><u>7254</u></b>	<b><u>4734</u></b>	<b><u>11988</u></b>	
<b>Australia</b>	2480	1047	<b>3527</b>	<b>7.87</b>
<b>Qatar</b>	904	1648	<b>2552</b>	<b>7.39</b>
<b>Malaysia</b>	982	497	<b>1479</b>	<b>7.96</b>
<b>Russia</b>	597	195	<b>792</b>	<b>8.29</b>
<b>Indonesia</b>	491	185	<b>676</b>	<b>8.02</b>

\* Export Revenues minus transportation costs, and royalty fees.  
Source: World Gas Intelligence various issues.



## Tables Annex

