
The Great Unbundling: How MENA's NOCs Are Unlocking Billions Through Infrastructure Monetization

Gulf national oil companies are selling stakes in pipelines, storage and transmission assets to fund both core hydrocarbon growth and the region's low carbon pivot.

THE SHORT ANSWER

How are MENA's national oil companies unlocking billions in capital without giving up control of their infrastructure?

Gulf NOCs are selling minority stakes and running lease and leaseback deals on de-risked midstream assets, raising sums such as Saudi Aramco's \$11 billion Jafurah leaseback and ADNOC's over \$14 billion in pipeline stake sales. That capital is then recycled into both core oil and gas expansion and low carbon diversification.

In this briefing

01

02

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04

FIG.54.01 · DATA

FIGURES AS STATED IN THE FULL DOSSIER; ESTIMATES MARKED AS SUCH.

What matters

01	Saudi Aramco completed an \$11 billion lease and leaseback deal tied to its Jafurah unconventional gas project.						
02	ADNOC has raised over \$14 billion selling pipeline stakes to global investors including BlackRock and KKR.						
03	OQ Gas Networks in Oman ran a \$750 million IPO covering 49% of its pipeline division.						
04	Bapco Energies of Bahrain sold a minority stake in the Saudi-Bahrain oil pipeline while retaining operational control.						
05	ACWA Power is advancing a 1 GW solar and storage complex in Egypt underwritten by this monetization-linked financing.						

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