

# Oman Water Report Q1 2015

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## Abstracts

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**BMI View:** This quarter we have extensively expanded and revised our forecasts for extraction by source, mains, non mains and household consumption, and water losses. Overall we expect steady investment to result in reduced losses and higher water production levels; however, although residential demand growth will remain muted, we expect industrial and commercial demand to rise steadily driving future investment in the sector.

Oman's water infrastructure sector offers extensive opportunities across both supply and distribution, with a healthy project pipeline, as older facilities are being decommissioned and new projects and networks are needed to replace them. The country is open to foreign players and a number of international entrants are included among the qualified bidders for various tenders, such as Tedagua and various consortiums led by Hyflux, Sumitomo, Valoriza, Itochu and Abengoa. However, we highlight that there is a high Omanisation requirement, increasing to 50% over time, and a significant percentage of the materials used must be from Oman. We highlight that this can cause some risks to incoming businesses owing to the limited size and skill-set of much of Oman's available labour force.

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