

# States, Their NOCs, and Implications for Operating Environments

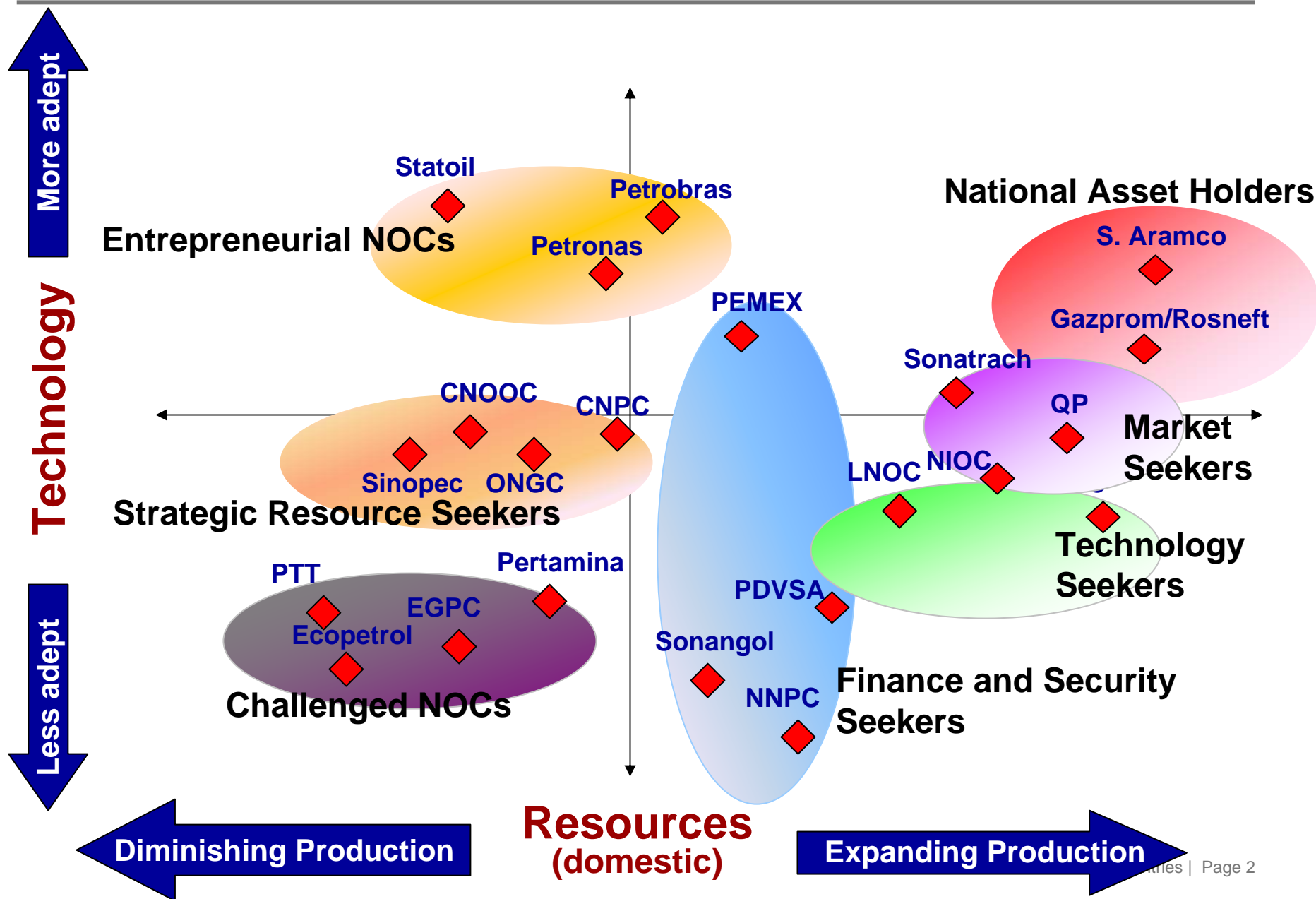
2006 CCA Africa Oil and Gas Forum

David Kirsch, Markets & Countries Group

December 2006



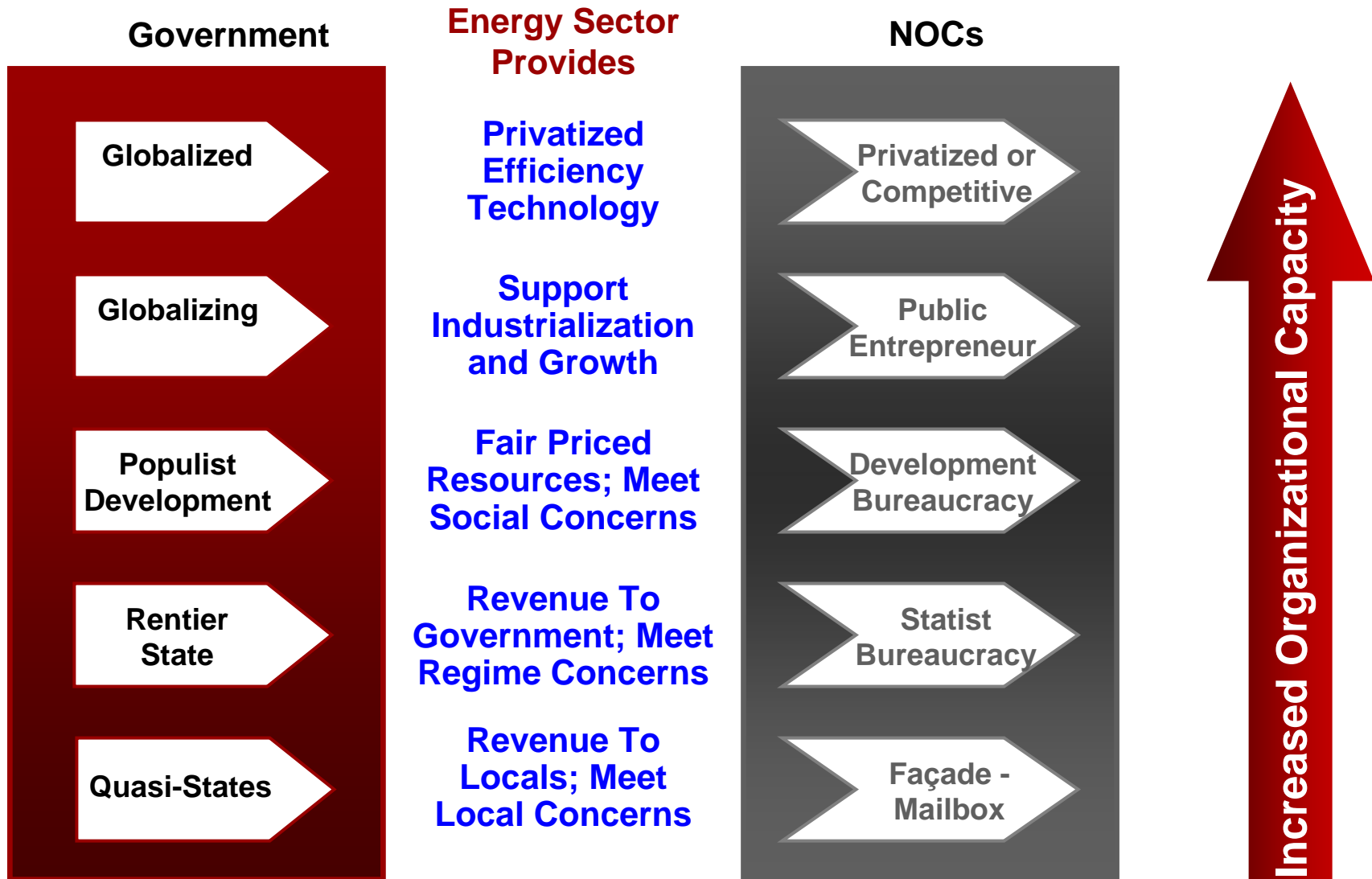
# PFC Energy's NOC Landscape



# State Types and Their Development Needs

	Government	Econ. Objectives Main Actors	Sub Types	Examples
	Globalized	Diversity Price Stability Private Sector	Social Democrat Entrepreneurial	Norway US and UK
	Globalizing	Industrialization Growth/Mkt Share Mixed Economy	Democratic Authoritarian	India China
	Populist Development	Wider Access Distribution State Led	Differences not significant	Indonesia Venezuela
	Rentier State	Special Access Stability State Led	Coercive Non-coercive	Algeria Saudi Arabia
	Quasi-States	Survival Instability Local Led	Failing Failed	Nigeria Sudan

# NOCs Reflect State Needs & Structures



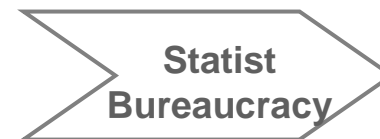
# Examples of NOC and States: Quasi-States

**Government**

**NOCs**



**Nigeria  
Iraq**



**NOC, SOC**



**NNPC**

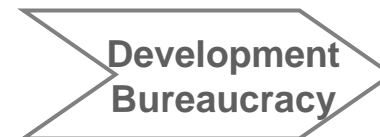
# Examples of NOC and States: Rentier

**Government**

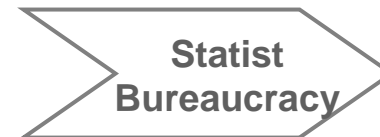
**NOCs**



**Saudi Arabia  
Angola  
UAE**



**S. Aramco**



**Sonangol**



**Adnoc**

# Examples of NOC and States: Pop. Development

**Government**

**NOCs**

**Populist  
Development**

**Venezuela  
Iran  
Indonesia**

**Development  
Bureaucracy**

**NIOC**

**Statist  
Bureaucracy**

**PDVSA**

**Façade -  
Mailbox**

**Pertamina**

# Examples of NOC and States: Globalizing

**Government**

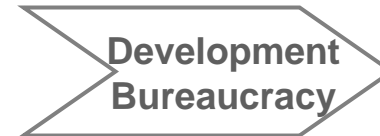
**NOCs**



**Malaysia  
China  
Brazil**



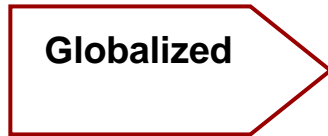
**CNOOC  
Petronas**



**Petrobras  
Sinopec  
CNPC**

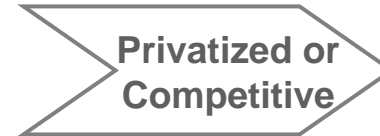
# Examples of NOC and States: Globalized

## Government



Norway  
UK  
France

## NOCs

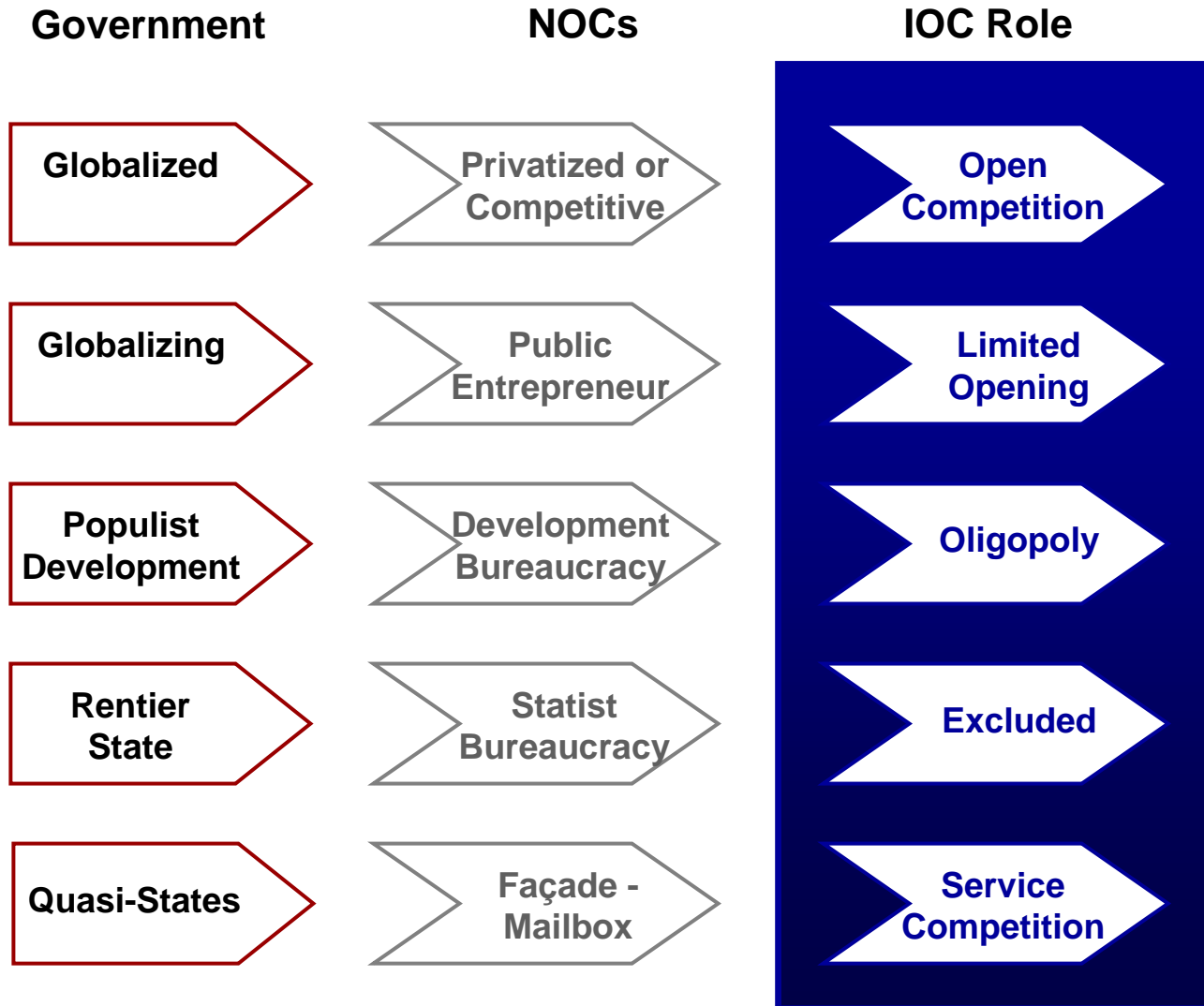


BP  
Total

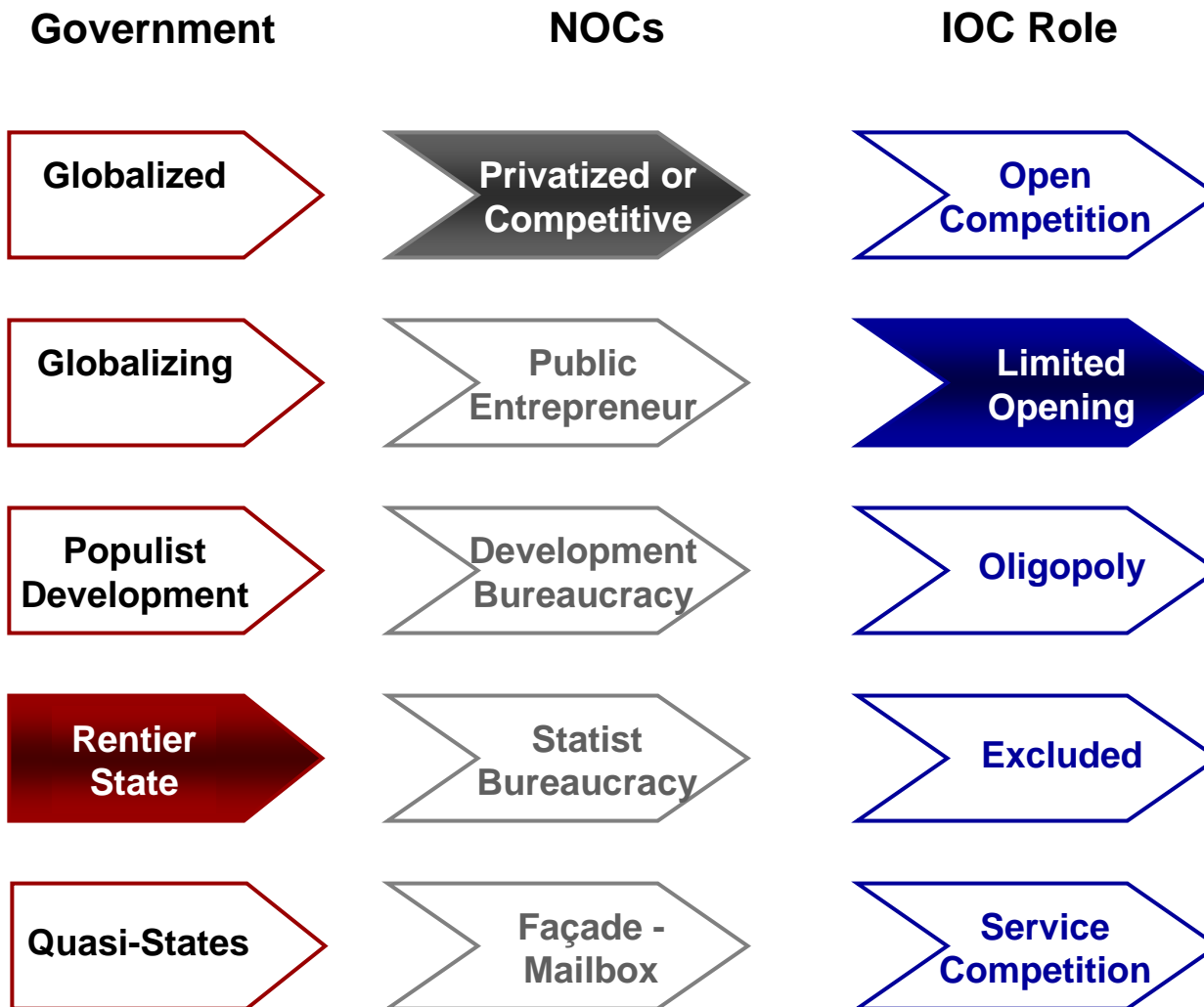


Statoil

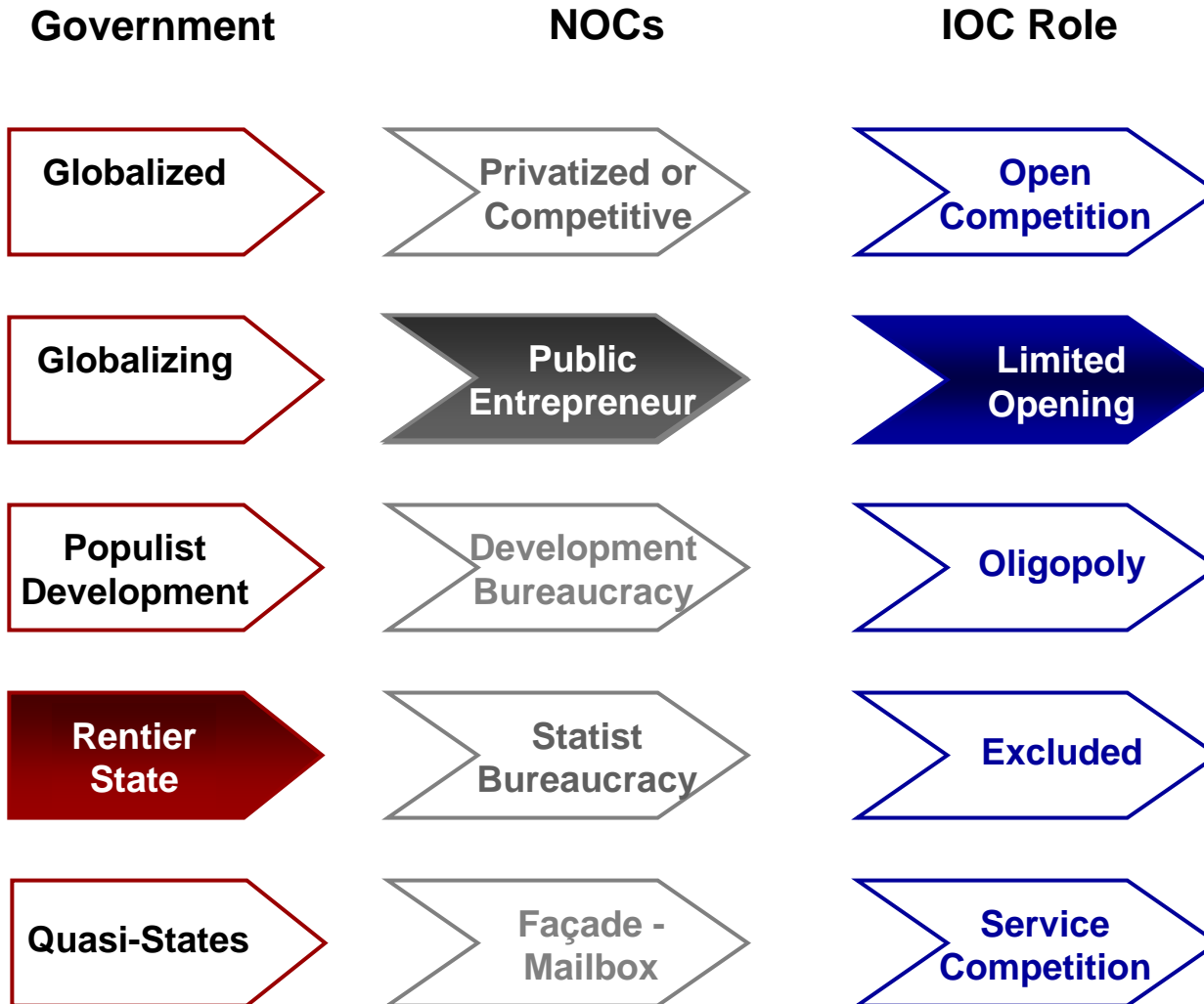
# IOC Role = State Needs - NOC Capacities



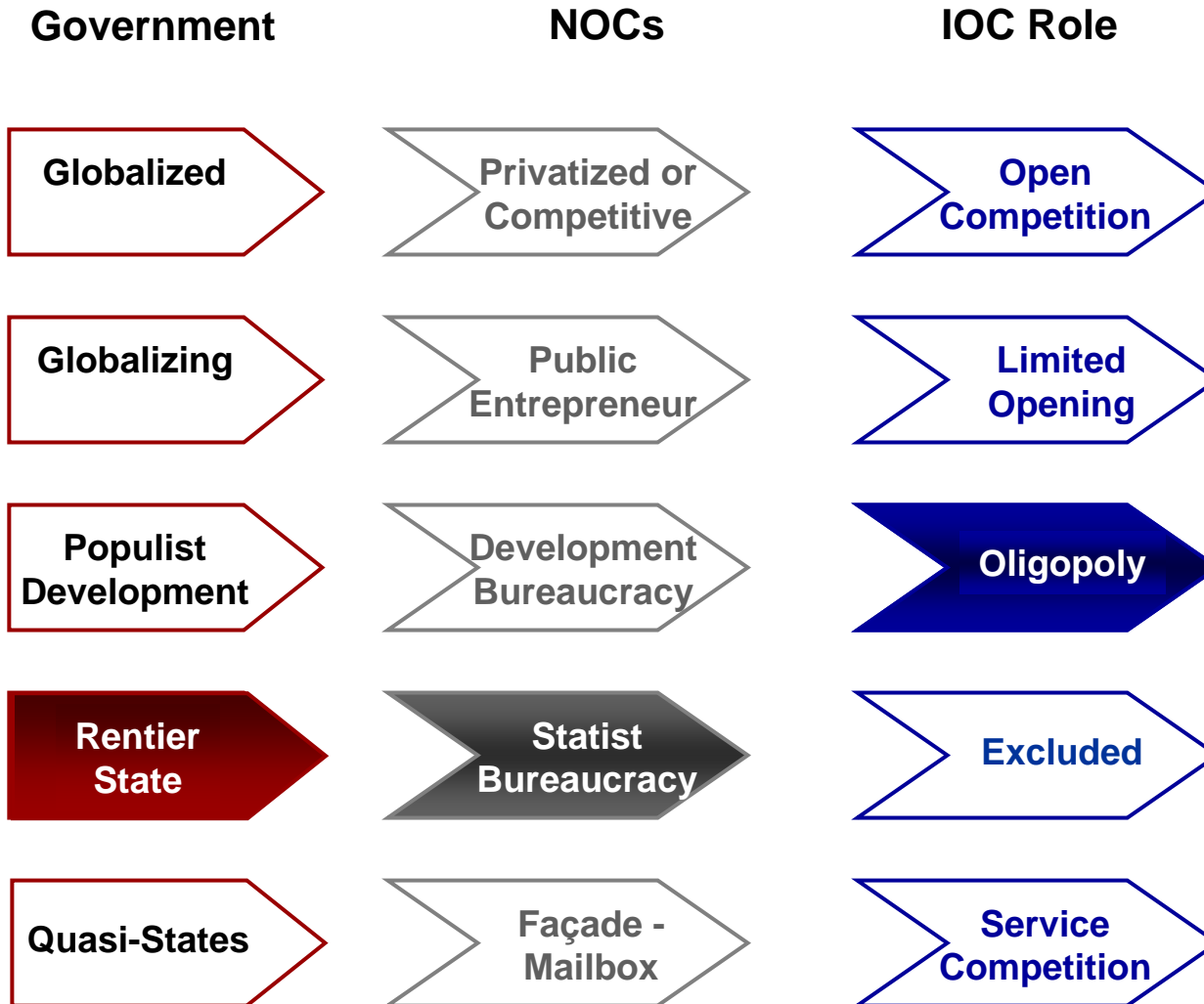
# Russia: State Re-builder Putin Wants NOCs



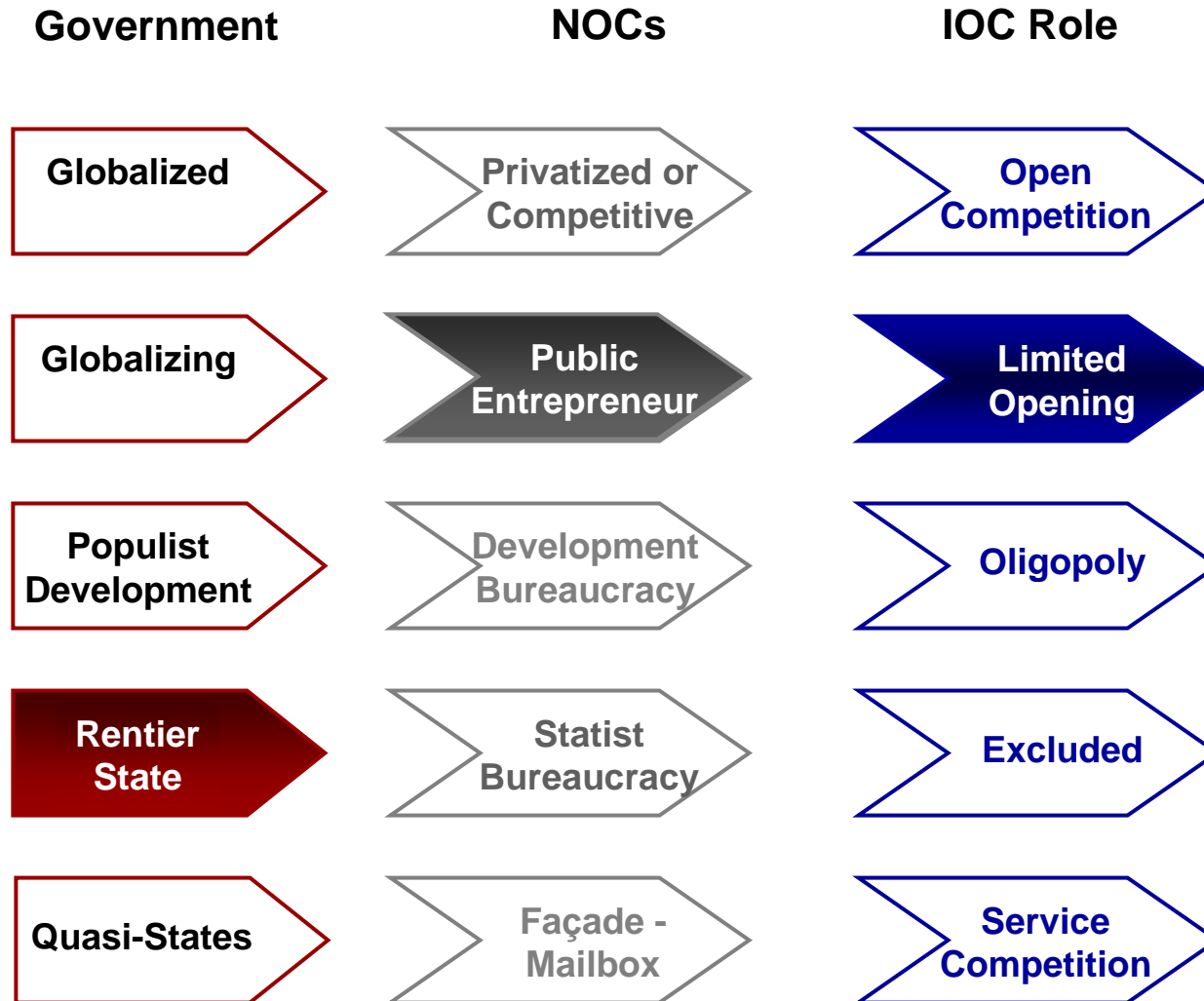
# Venezuela: Giusti's Failed Gambit



# Nigeria: Political Crisis and Regression



# Algeria: Aborted NOC Reform



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- ▶ **Kuala Lumpur**
- ▶ Lausanne
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- ▶ Mumbai
- ▶ New York
- ▶ **Paris**
- ▶ San Francisco
- ▶ **Washington, D.C.**

*Main regional offices are shown in bold.*

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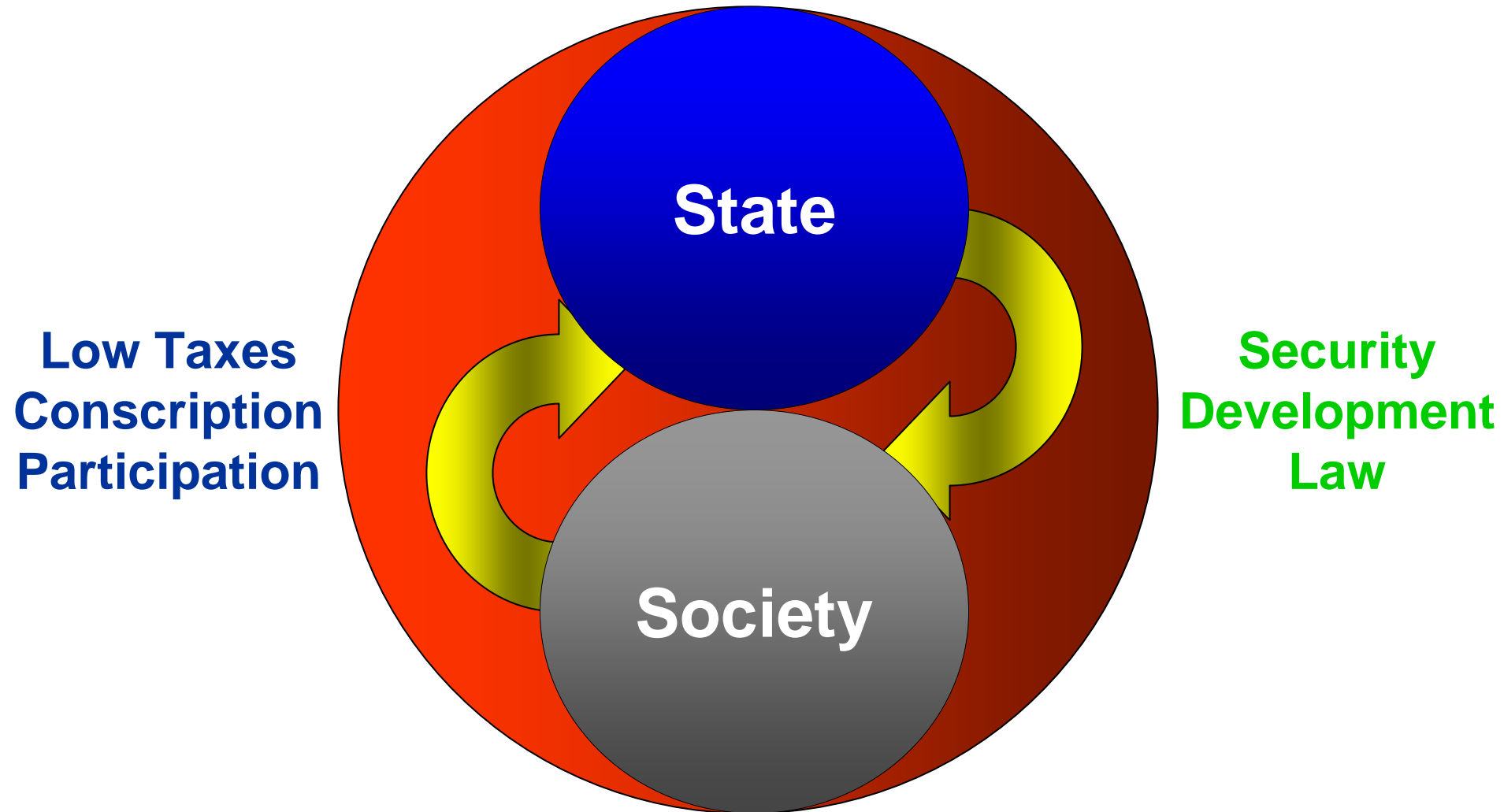
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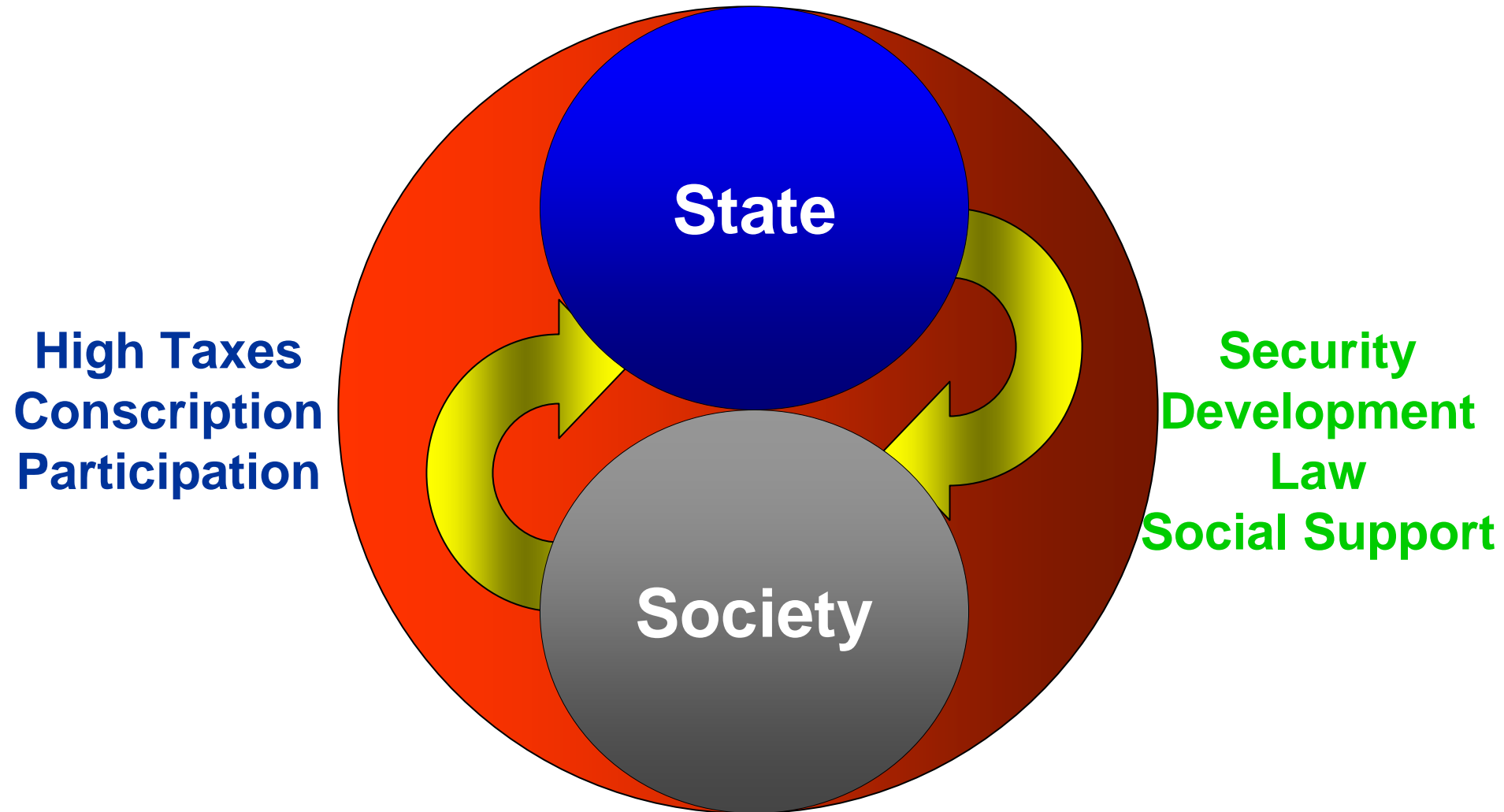
4545 Post Oak Place, Suite 312  
Houston, Texas 77027-3110, USA  
Tel (1 713) 622-4447  
Fax (1 713) 622-4448

# **Appendix**

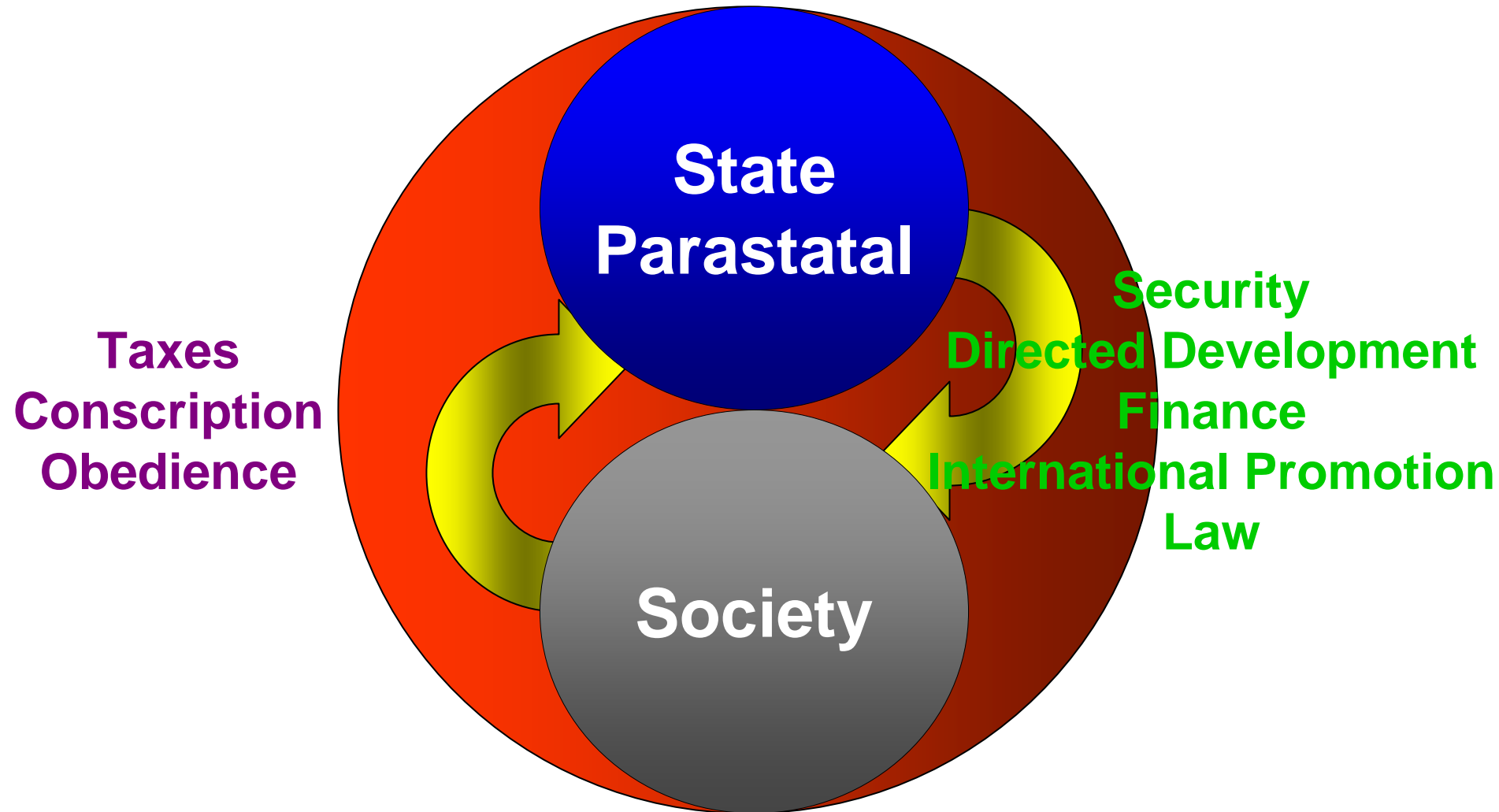
## **State Types and Relations with NOCs**



**Mutually Strengthening Reciprocity  
With Strong Emphasis on Economic Flexibility**

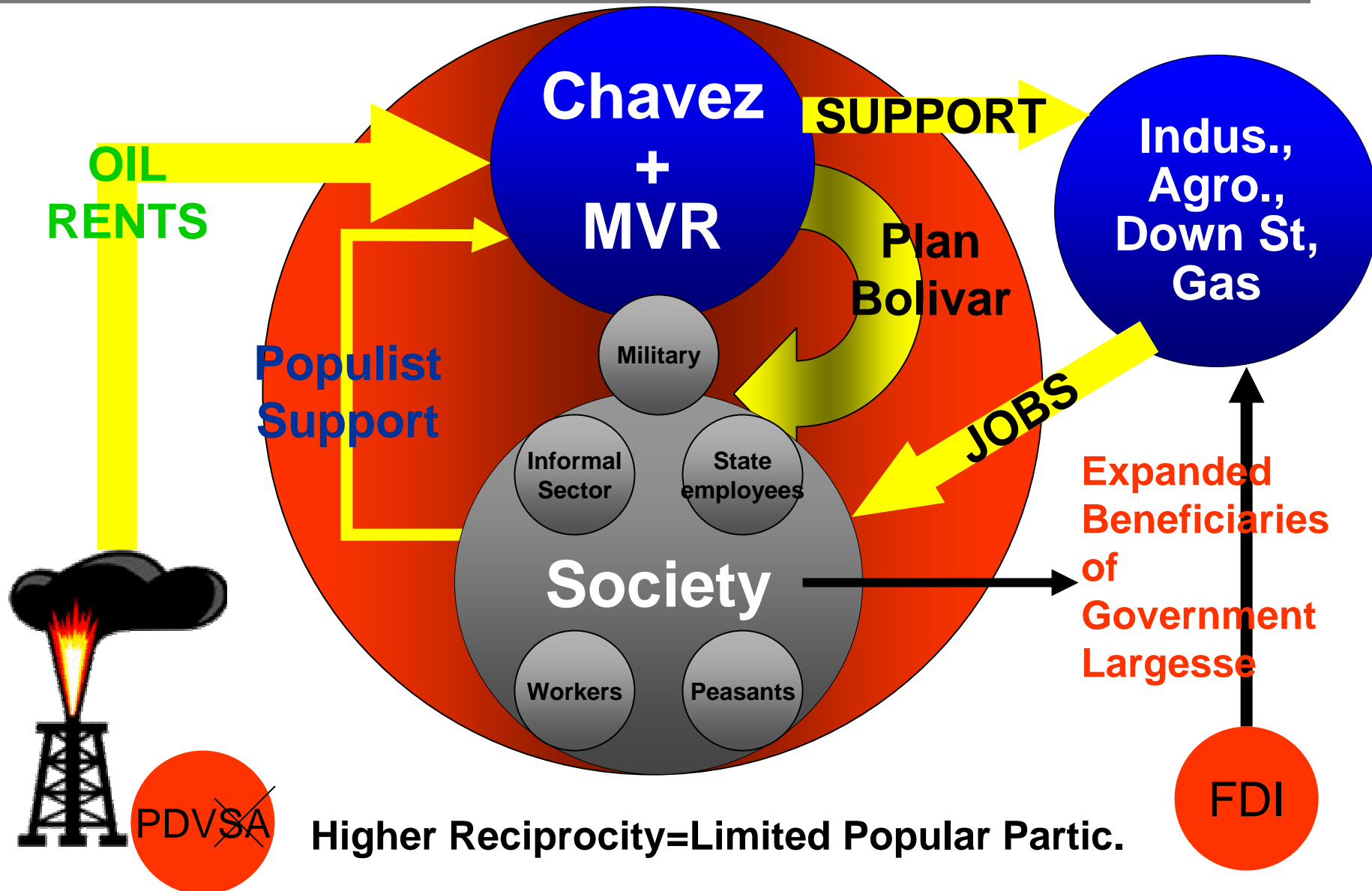


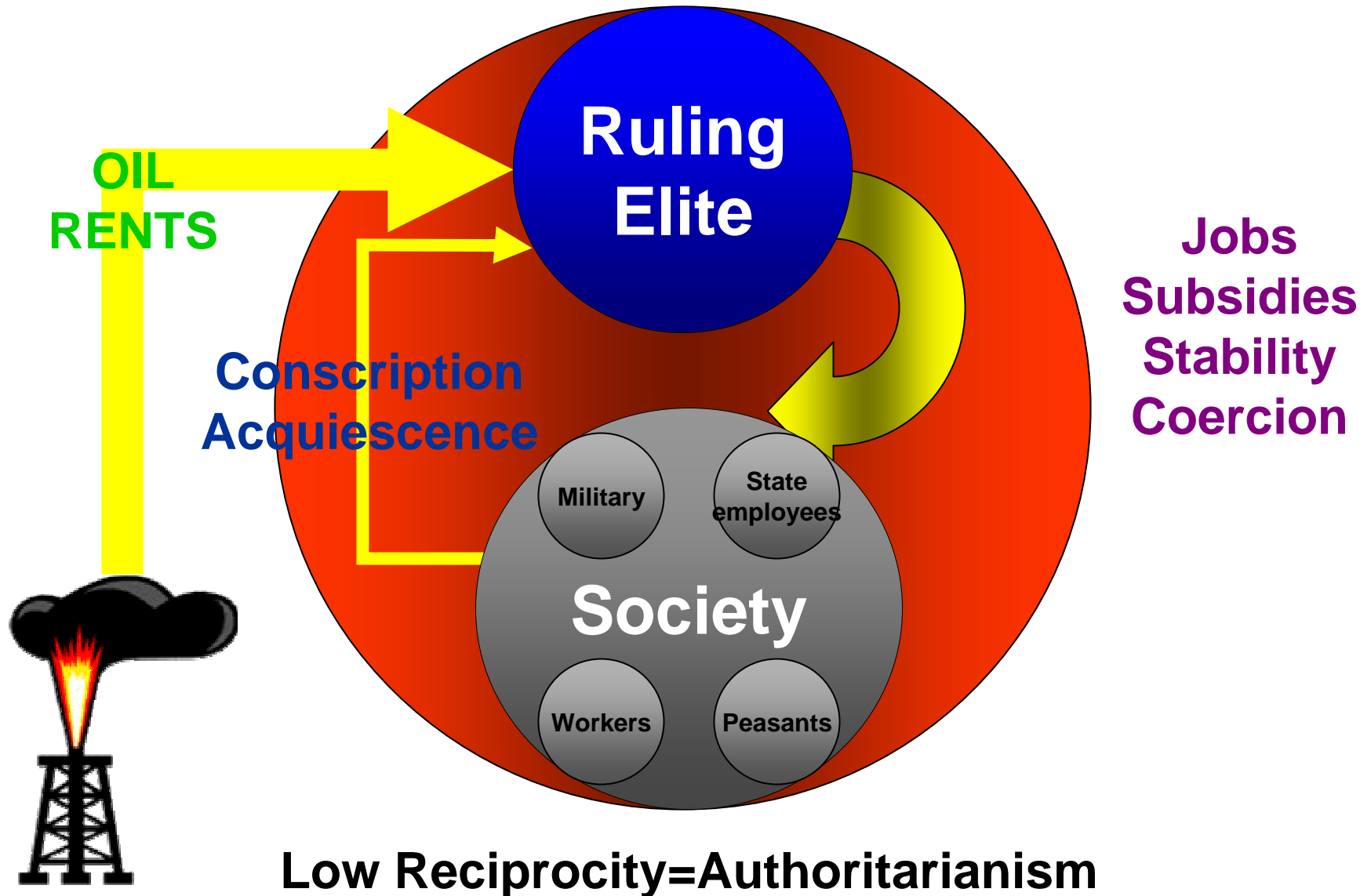
**Mutually Strengthening Reciprocity  
With Strong Emphasis on Social Stability**



**Obedience In Return For Growth**

# Populist Development State





# Rentier State: Small Pop., Tribal Non-Coercive

