

IHS ENERGY

Market Survey System - Offshore Services

Onshore **Offshore** Capital Equipment Drilling and Well Services Services

Gain a comprehensive understanding of industry supply and demand of rigs and vessels, day rates, yards and other fabrication facilities serving the offshore industry



The Market Survey System advantage

IHS Market Survey System (MSS) is a comprehensive service providing timely market intelligence on oil and gas industry supplier markets. MSS delivers market insights for strategic planning; knowledge on capital-intensive procurement and business development; in-depth market analysis, including supply, demand, and cost/pricing outlooks for key supplier segments in the offshore oil and gas industry; and detailed information on upcoming projects and trends. A separate MSS Cost Model provided for each market segment analyzes historical and projected costs based on changes to key cost drivers.

IHS is the service provider and operator of MSS, which began as an industry initiative sponsored by a group of major oil and gas operators. Since the inception of MSS the scope of services has expanded, creating measurable success for our members. As a result, MSS is now considered the industry standard for market intelligence on the oil and gas supplier markets.

National and international oil companies, financial institutions, manufacturers, and engineering, procurement, and construction (EPC) and other service companies benefit from being members of MSS.

In an industry challenged by supply bottlenecks, local content requirements, cost overruns, and project delays, is your company positioned to capitalize on the changing market?

MSS — IHS Offshore Services reports on nine major offshore oil and gas segments



Topsides Fabrication



Offshore Heavy Lift



Offshore Accommodation



FPSO/FSO



Floaters: SPAR, TLP, Semisubs...



Offshore Pipelay



Offshore Installation



Jacket Fabrication



FLNG

Topsides Fabrication: The MSS topsides fabrication market segment includes the fabrication of new topsides for all offshore production, process, accommodation, utilities and wellhead facilities. These are highlighted in the diagram below. The fabrication of individual topsides modules destined for newbuild topsides is also included.

FPSO/FSO: The Floating Production, Storage and Offloading, and Floating Storage and Offloading facilities (FPSO/FSO) market segment covers the construction of newbuild units, conversion of tankers into FPSO/FSOs and the upgrading/retrofitting of exiting units for redeployment.

FLNG: The Floating Liquefied Natural Gas (FLNG) market segment covers the construction of floating newbuild units, the construction of barge FLNG or near-shore units, and conversion of LNG carriers into FLNGs. Hull construction and conversion are the primary focus of this market segment.

Floaters – SPAR, TLP, Semisubmersibles:

The floaters (semis, TLPs and spars) market segment covers the construction of newbuild production semisubmersibles (semis), tension leg platforms (TLPs) and spars. Floaters are normally deployed in locations with extensive pipeline infrastructure, such as the US GOM. Semis are the most widely used unit among the three types of floaters.

Offshore Heavy Lift: The offshore heavy lift market segment encompasses the heavy lift activities undertaken by derrick vessels and derrick pipelay vessels capable of lifting 1,500 metric tons or more, while working on offshore oil and gas projects. Heavy lift vessels may be required for a variety of offshore tasks during the installation and decommissioning of offshore platforms, including jackets, topsides and modules.

Offshore Installation – DSV/ROVSV: The Offshore Installation (DSV/ROVSV) market segment encompasses activities covered by Diving Support Vessels (DSVs), Remotely Operated Vehicle Support Vessels (ROVSVs), multiservice vessels and well intervention vessels. Segment analysis includes DSVs and ROVSVs classed as DSV2 and ROVSV2 or higher.

Offshore Pipelay: Pipelay vessels (PLV) make up the core of the offshore pipelay fleet, installing pipes in both shallow and deep waters. If they are fitted with cranes, these can lift structures weighing less than 400 metric tons, while Derrick pipelay vessels (DPLV) are equipped with an offshore crane or non-rotating crane that can lift 400 metric tons or more as well as pipelay equipment.

Offshore Accommodation: The offshore accommodation market segment encompasses any offshore vessel designed exclusively for, or employed primarily in, the offshore accommodation market. This includes the deployment of newbuild and converted accommodation units operated by contractors on lease contracts with oil companies.

Jacket Fabrication: The MSS jacket fabrication market segment includes the fabrication of all relevant steel structures that are secured rigidly to the seabed with steel piles with the primary purpose of supporting the deck/topsides of an offshore platform.

Each market segment report delivers insight and analysis on trends that are crucial to your decision making including:

- The latest updates and direction on major offshore oil and gas projects worldwide, including project delays, cost developments, and contract awards
- Historical and projected EPC demand and capital spending (both worldwide and regional), including which regions have had the most investment and activity historically and which ones are expected to have the most in the future
- Historical and projected costs trends for each of the 9 offshore segments, including quarterly tracking of more than 300 cost drivers
- An overview of the players—operators, EPC and engineering contractors, subcontractors, suppliers, and equipment and technology providers—including their capabilities, market share, track record, backlog, and financial situation

Features of the Market Survey System

Market segment analysis

MSS covers more than 30 market segments, and new segments are being evaluated and added continuously. Reports provide an in-depth analysis of key supplier markets in the oil and gas industry, including supply and demand projections, cost modeling, and trends. The reports are updated multiple times during the year and delivered in four formats: PDF, Word, PowerPoint summary, and Excel spreadsheet for the MSS Cost Model.

Supplier and contractor profiles

More than 700+ industry suppliers are tracked by our team of analysts. For about 100, we provide profiles with valuable insight on the contractor's capabilities and performance. These reports are updated multiple times each year and delivered in three formats: Word, PDF, and a PowerPoint summary.

News and alerts

Providing timely updates, a daily news service covers contracts, structural changes, project status, developments on major assets, financials, strategic moves, and other significant stories on the suppliers/contractors and markets covered within MSS.

Customized reports

Our dedicated teams of analysts are available to conduct studies and produce customized reports based on member's requests.

MSS delivers value throughout oil and gas organizations:

- Business Development Managers
- Strategic planners and managers
- Project managers
- Supply chain managers
- Supplier quality engineers
- Project procurement managers
- Category managers
- Strategic sourcing
- Market intelligence and research managers

Product benefits

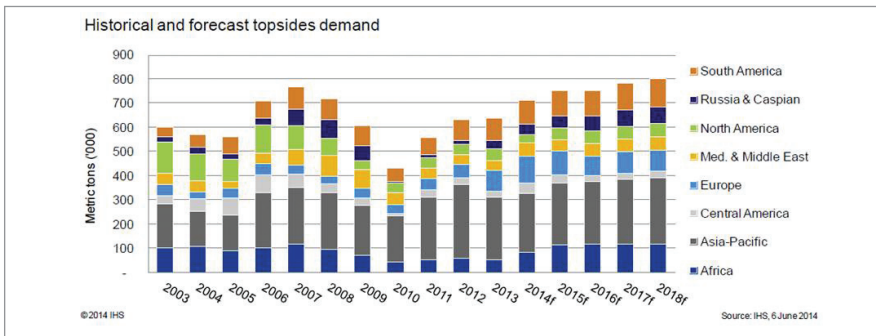
Members use MSS for the following high-impact activities:

- Strategic planning
- Business development
- Strategic sourcing/supply chain planning
- Cost planning
- Negotiations

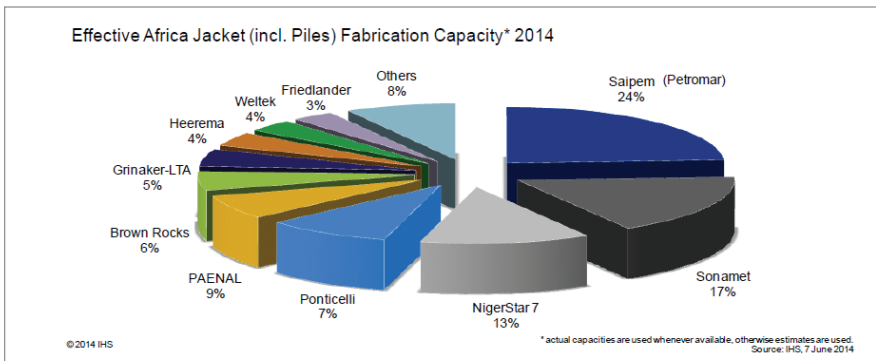


MSS enables oil and gas operators to:

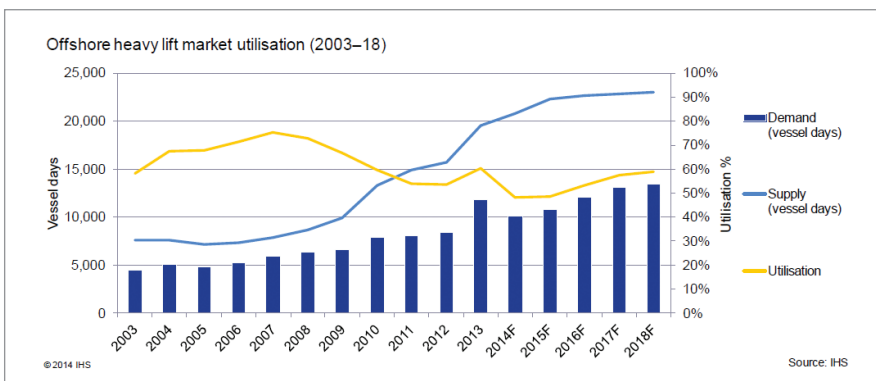
- Make better sourcing decisions and more predictable project deliveries
- Identify supply bottlenecks and opportunities
- Understand the impact of key cost drivers
- Better manage their suppliers (Supplier Relationship Management)



Operator: “How many units will be available in 2016 where my projects are located?”



Operator: “What will be the regional jacket fabrication capacity by contractor in Africa?”

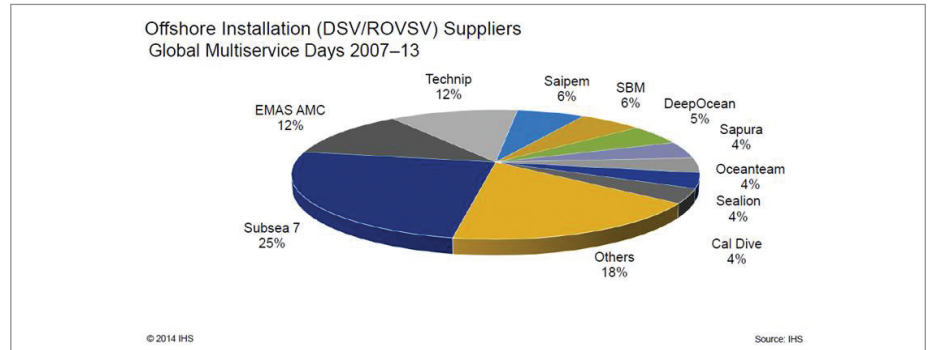


Operator: “When is the best time to tender for my new project?”

MSS enables suppliers and contractors to

- Identify upcoming projects and future growth markets
- Track performance and projects of key competitors
- Understand future demand requirements and the current supply base
- Foresee opportunities and constraints in the supply chain

Supplier/contractor: “Who are the key suppliers I should consider for DSV/ROVSVs?”

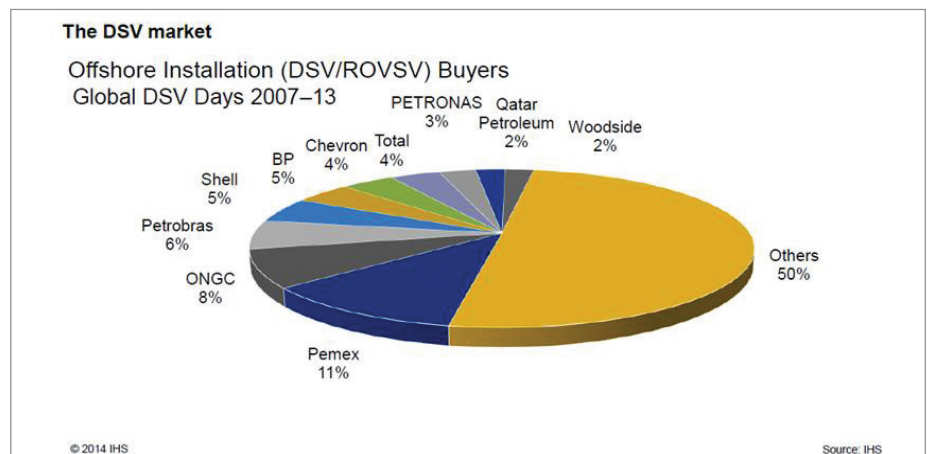


Supplier/contractor: “Which yards have the expertise to handle my FLNG projects?”

Market Position	Contractor	FLNG Capabilities					Main yard Location(s)
		EPC	Newbuild				
			Super heavyweight	heavyweight	Medium-weight	Lightweight	
Major	DSME	X	X	✓	✓	✓	South Korea
	Hyundai HI	X	✓	✓	✓	✓	South Korea
	Samsung HI	X	✓	✓	✓	X	South Korea
Minor	Wilson O&M	X	X	X	X	X	China
	Keppel O&M	X	X	X	X	X	Singapore
Future	Sembcorp	X	X	X	X	X	Singapore
	COSCO	X	X	X	✓	X	China
	Mitsubishi HI	X	X	X	✓	✓	Japan
	Japan Marine United	X	X	X	✓	✓	Japan

Source: IHS, 10 April 2014

Supplier/Contractor: “Who will be the buyers for my products and services?”



MSS enables **financial institutions** to

- Identify growth markets
- Identify market structures, growth rates, market shares, and potentials of consolidation
- Assess the financial viability of new projects
- Analyze suppliers' and contractors' potential based on order book developments

MSS delivers value throughout financial organizations:

- Corporate finance
- Advisors
- Portfolio managers
- Investment directors
- Financial analysts
- Financial advisors
- Investment managers

Representative Supplier/Contractor profiles

- Aker Solutions
- Alfa Laval
- Allseas
- AMEC
- Air Products
- ArcelorMittal
- Baker Hughes
- Bechtel
- Black & Veatch
- Bourbon
- Bristow
- Cal Dive
- Cameron
- CB&I
- CCC
- CGGVeritas
- CHC Helicopter
- China Oilfield Services (COSL)
- Chiyoda
- CNPC–China Petroleum Pipeline Bureau
- China Offshore Engineering Company (COOEC)
- China State Shipbuilding Corporation (CSSC)–Shanghai Yard
- Daewoo E&C
- China Shipbuilding Industry Corporation (CSIC Offshore)–Dailan Shipbuilding
- Doris Engineering
- Dresser–Rand
- Dril–Quip
- Daewoo Shipbuilding and Marine Engineering (DSME)
- ENSCO
- Entrepose Contracting
- Europipe
- Fluor
- FMC Technologies
- Foster Wheeler
- GE Oil & Gas
- Halliburton
- Heerema Group
- Helix
- Hyundai Heavy Industries (Hyundai HI)
- IHI Corporation
- J Ray McDermott
- Jacobs Engineering
- JGC
- KBR
- Keppel Offshore & Marine
- Kiewit
- Kvaerner
- Larsen & Toubro
- Linde Engineering
- Maersk Oil and Gas Contractors
- MANTurbo
- Marubeni–Itochu
- Mitsui Engineering
- Malaysia Marine and Heavy Engineering (MMHE)
- Modec
- Mustang Engineering
- Nabors
- National Oilwell Varco
- Nippon Steel
- NKT Flexibles
- Noble
- NPCC
- Oceaneering
- Panalpina
- Petrofac
- Prysmian
- Punj Lloyd
- Rolls–Royce
- Saipem
- Samsung HI
- SBM Offshore
- Schlumberger
- Sea Trucks Group
- Seadrill
- SembCorp Marine
- Siemens
- SNC–Lavalin
- Solar Turbines
- Subsea 7
- Sumitomo MI
- Tata Steel Europe (Corus)
- Techint E&C
- Tecnicas Reunidas
- Technip
- Tenaris
- Toyo Engineering
- Transocean
- URS Corporation
- Vallourec
- Weatherford
- Welspun
- Wilbros
- Wood Group
- WorleyParsons

ABOUT IHS ENERGY

IHS Energy, part of IHS (NYSE: IHS), is the industry's authoritative provider of information, analytics, and insight to help clients to understand the interconnected, dynamic forces that shape energy markets and asset performance. Our experts and analytical tools enable clients to continuously improve their strategy and operations across the entire energy value chain covering oil & gas, coal, power, and renewables.

FOR MORE INFORMATION

EUROPE/OSLO

Frank Larsen
Market Intelligence Manager
Tel: +47 21 05 90 60
Mobile: +47 928 13 135
Email: frank.larsen@ihs.com

AMERICA/NORWALK

Bill Redman
Senior Director,
Costs & Strategic Sourcing
Tel: +1 203 644 1803
Mobile: +1 203 246 5088
Email: bill.redman@ihs.com

APAC/SINGAPORE

Seimin Kuan
Senior Manager,
Costs & Strategic Sourcing
Tel: +65 6439 6208
Mobile: +65 9649 4600
Email: seimin.kuan@ihs.com

Offshore-specific segments

- Topsides Fabrication
- Floating production, storage, and offloading (FPSO/FSO) units
- Floating LNG (FLNG)
- Floaters—tension leg platforms (TLPs), spar, semisubmersibles
- Offshore Heavy Lift
- Offshore installation (diving support vessels [DSVs]/remotely operated vehicle support vessels [ROSVs])
- Offshore Pipelay
- Offshore Accommodation
- Jacket Fabrication

Further MSS coverage

- Construction labor
- Drilling fluids
- Engineering services
- Gas compressors
- Gas turbines
- Heat exchangers
- Industry trends
- Upstream Spend Report
- Inspection, maintenance, and repair (platforms)
- Line pipe
- OCTG
- Offshore helicopter services
- Offshore rigs—floaters
- Offshore rigs—jackup
- Subsea equipment
- Umbilicals and flexible pipes
- Well logging
- Onshore production facilities
- LNG liquefaction facilities
- LNG regasification terminals
- Onshore pipelay
- Onshore drilling rigs
- Oil Sands mining

