Market Survey System - Services

Improve your strategic planning and supply chain management by identifying supply constraints, sourcing of skilled labour, buyer dynamics and new capacity opportunities.
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 onshore 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 Services reports on major oil and gas service segments.

- Inspection maintenance and repair
- Engineering services
- Offshore Helicopter Services
- Construction labour
**Construction Labour** segment covers the market for construction labour in five key oil and gas countries - Australia, Brazil, Canada, Iraq and Nigeria. The five individual reports each look at the demand for and supply of construction workers in these countries, analysing the demand from oil and gas projects alongside competing industries including infrastructure, mining and power plant projects. Major oil and gas projects requiring high numbers of workers are examined, outlining where potential bottlenecks exist between now and 2020.

**Engineering Services** segment covers all engineering performed in the field development phase of oil and gas projects. Analysis encompasses engineering prior to project sanction, including conceptual studies and front end engineering and design (FEED), and engineering and project management during the construction phase of field development (EPC/EPCm).

**The Inspection, Maintenance & Repair (Platforms)** market segment covers inspection, maintenance and repair of platform topsides and other superstructures above sea level. Demand is determined regionally based on the total weight of topsides in operation, adjusted for region-specific factors.

**Offshore helicopter services** market segment focuses on personnel transport operations to offshore platforms, vessels and infrastructure. Flying activity relating to seismic exploration is, to a lesser extent, reviewed in the report. As the dynamics within the helicopter production market will affect the capacity of helicopter service suppliers, an overview of the demand/supply situation in helicopter manufacturing is also provided.

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 onshore 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 four services 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.

MSS also provides the same detailed analysis on a broad range of other markets directly relevant to players in the oil and gas industry—including heat exchangers, gas turbines, gas compressors, oil country tubular goods (OCTG), well logging, drilling fluids, and offshore construction vessels.
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 and contractors 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: “Which companies am I competing with when trying to source helicopters?”

Operator: “Will there be enough skilled workers available to meet the labour needs for my project?”

Operator: “Which suppliers have proven track records in the regions where I’m working?”
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:
“Where will I be able to find trained staff to enable me to deliver contracts?”

Supplier/Contractor:
“Should I be looking to invest in new capacity?”

Supplier/Contractor:
“Which buyers in the specific region should I focus my sales effort on?”
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**

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## 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

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## Services-specific segments

- Offshore helicopter services
- Inspection, maintenance, and repair (platforms)
- Engineering services
- Construction labor

## Further MSS coverage

- Gas turbines
- Gas compressors
- Heat exchangers
- Drilling fluids
- Line pipe
- Subsea equipment
- Umbilicals and flexible pipes
- Onshore production facilities
- LNG liquefaction facilities
- LNG regasification terminals
- Onshore pipelay
- Onshore drilling rigs
- Oil Sands mining
- Industry trends
- Upstream Spend Report
- Onshore drilling rigs
- Offshore rigs—floaters
- Offshore rigs—jackup
- OCTG
- Drilling fluids
- Well logging
- 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 [ROVSVs])
- Offshore Pipelay
- Offshore Accommodation
- Jacket Fabrication