Subsea UK

Neil Gordon
Chief Executive Officer

Championing the UK Subsea Sector Across the World
We act for the entire supply chain bringing together operators, contractors, suppliers and people in the industry.
Offshore Field Sectors

**Topside**
Platforms - Fixed, floating, land based

**Subsea**
Seabed to Surface (water column)
“SURF” (Subsea, umbilicals, Risers and Flowlines)
Manifolds, SCM’s, Xtrees, wellheads, booster pumps, separation, pipelines etc.

**Sub-Surface**
Downhole, drilling, casing, geology and reservoir, well intervention etc.
System types can be grouped into 2 categories:

1. **Dry Tree Systems**
2. **Wet Tree Systems**
Subsea Excellence – No Accident

COMPETENCY
Skills, Education, Training
Standards, Design Norms
Codes of practice, Guidelines, Professional Development

CAPABILITY
Knowledge
Technologies
Products
Tools

CAPACITY
People
Assets & Facilities
Finance & Investment

www.subsea.uk.com
Subsea UK Profile

- Founded in 2004; industry partnership with government
- Self sustaining privately funded trade body
- Champions for the UK Subsea supply chain through:
  - Supporting Business Development
  - Innovation & Technology
  - Skills & Future Talent
  - Diversification
  - Exports & International Business

www.subsea uk.com
Subsea UK Membership Profile

Over 330 members

- Operators
- Main contractors
- Engineering houses
- Manufacturers
- Sub suppliers
- Component suppliers
- Academia
- Support services

www.subseauk.com
Subsea Companies in the UK

UK Subsea Companies by Region
(Sample of 761 companies)

www.subsea.uk.com
Cluster or Hub?

- Supply Chain Mapping
- Connecting industry
- Information provision
- Exclusive V’s Inclusive
- Market Intelligence
- Technology Roadmap

www.subseauk.com
## Supply Chain Segmentation

### SUPPLY CHAIN CATEGORIES

- **Main Contractor / Consultancy**
- **Integrated Services**
- **Project Management**

### MARINE, SUBSEA & PIPELINES

- **Engineering, Design and Construction**
- **Installation / Removal**
- **Operations, Maintenance, Modifications and Decommissioning**

<table>
<thead>
<tr>
<th>SUPPLY CHAIN CATEGORIES</th>
<th>MARINE, SUBSEA &amp; PIPELINES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Manufacturing</td>
<td>Vessels</td>
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<tr>
<td>• Fabrication</td>
<td>Mooring &amp; Foundations</td>
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<tr>
<td>• Machining</td>
<td>Survey / Positioning</td>
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<tr>
<td>• Precision Engineering</td>
<td>Structures / Xmas Trees / Manifolds / Manifolds / Templates / Wellheads</td>
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<tr>
<td>• Supplier / Distributor / Stockist</td>
<td>Process, Pumping and Power Systems</td>
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<tr>
<td>• Agent</td>
<td>Controls, Sensing, Monitoring &amp; Communication</td>
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<tr>
<td>• Consultant</td>
<td>Pipe / Flexibles / Risers / Flowlines</td>
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<tr>
<td>• Services</td>
<td>Umbilicals / Cables</td>
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<tr>
<td>• Technology Provider</td>
<td>Diving / ROV / AUV</td>
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<tr>
<td>• Specialist</td>
<td>Subsea Inspection / Repair / Maintenance</td>
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<tr>
<td>• R&amp;D (to be identified separately)</td>
<td>Subsea Well Intervention</td>
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<td></td>
<td>Buoyancy / Protection</td>
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<tr>
<td></td>
<td>Environmental / Site Studies / Monitoring</td>
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Total UK Subsea Sector Output

- Over £8.9 billion - equal to 45% of world subsea market (£20 billion)
- Growth is due to both export and domestic market.
- North East Scotland dominates output due to presence of large contractors.
UK Subsea Sector Exports

UK Subsea Exports by Region - Total £4.3 Billion (£3.3 Billion in 2010)

- East Midlands: 9%
- East of England: 5%
- London: 1%
- North East England: 1%
- North East Scotland: 1%
- North West England: 1%
- Rest of Scotland: 1%
- South East England: 1%
- South West England: 1%
- Wales: 1%
- West Midlands: 1%
- Yorkshire: 3%

Subsea UK Business Report
Future Growth and Trends

Global Subsea Output - 2014 to 2019

• Predicted to grow by 100% over five years
• £20 billion to £40 billion
• Opportunity for UK companies
• Challenge to retain 45% share of global market
Member Benefits

- Business networking opportunities
- Members listing - website directory
- Members news and events (website)
- Subsea UK magazine (news)
- Members rates for events
- Overseas exhibition support
- Voice of members – local and national
- Business support – reports, databases, markets
Subsea UK Magazine

- Quality magazine for subsea industry
- 2,500 printed copies
- Distributed at international events
- Electronic distribution to over 15,000 contacts
- Members news
- Advertising opportunities

www.subseauk.com
Subsea UK Website

Main communication tool attracting almost 20,000 unique visitors monthly.

- Subsea Industry News HUB
- Subsea Company Directory
- Events, exhibitions, conferences
- SubseaIntel - Market Intelligence
- Resource Archives
- Subsea UK Magazine (print and online version)

www.subsea-uk.com
53,000 People Directly Employed

- Does not include an additional 13,000 employees who work for non-subsea companies that provide raw materials or support to the industry.
Skills & Future Talent

• Short Term
  – Conversion Programmes
  – Military personnel

• Medium Term
  – University Visits
  – Scholarships
  – Colleges

• Long Term
  – Subsea Career Website “Inside Industry”
  – School engagement

www.subseauk.com
Career Information Website
www.Subsea Target.com
Global Regional Hubs

- Europe – UK/Norway
- North America - GOM
- South America - Brazil
- Asia - Malaysia/Singapore/Indonesia
Exports & International Business

Strategic collaboration

• UKTI Trade Challenge Partner
• TAP (Tradeshow Access Programme)
• Inward/Outward Missions
• Host Joint Events
• Doing Business Overseas Guides
Major Events Supported

• Subsea Expo - Aberdeen UK
• Subsea Asia – Singapore & Indonesia
• Subsea Tieback Forum – New Orleans USA
• Offshore Europe – Aberdeen UK
• Rio Oil & Gas - Brazil
• ONS - Norway
• OTC - Houston USA
• AOG - Perth Australia

www.subseauk.com
Summary

- UK Subsea Centre of Excellence
- UK & Global Market Opportunities
- Supply Chain Alignment
- Skills and Knowledge
Thank You