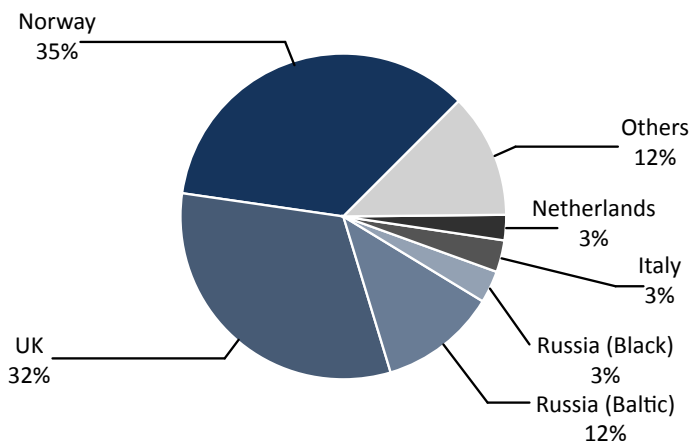


Infield Systems has just released the latest edition of its **Offshore Europe Oil and Gas Market Report To 2017**. This latest report provides a detailed forecast, including oil and gas capital expenditure projections and number of installations, for each of the main sectors in the offshore oil and gas industry, including: fixed platforms, floating production systems, subsea production units, pipelines and control lines; whilst also providing an overview of the demand and supply for vessels in the European region, as well as an assessment of potential deepwater activity.

The outlook for Europe is positive, with Infield Systems projecting just under a 95% increase in expenditure over the forthcoming period, which will be largely derived from projects in the NWECS. Western European offshore production is driven by the UK and Norway, which have increasingly targeted new exploration and production in deepwater and harsh-environment regions, such as West of Shetland and the Norwegian and Barents Seas. These areas will be critical if the likes of Norway and the UK are to slow the long term decline in reserves and production. In addition to new greenfield developments, high oil prices have encouraged substantial investment into enhanced oil recovery (EOR) programmes throughout the mature areas of the North Sea.

The Norwegian economy is driven by the oil and gas industry which is based offshore in the Norwegian sector of the North Sea; and with further energy deposits thought to lie within the Arctic waters of the Barents Sea, the country's position as one of the region's largest energy exporters looks to be secured.



**Europe Capex (%) by Country 2013-2017**

Source: Infield Systems' Europe Oil & Gas Market Report to 2017

In the UK, the 2012 Budget introduced a number of tax incentives in order to encourage greater exploration and development in the North Sea area. This has subsequently resulted in the vast majority of new projects now qualifying for the new tax breaks. In addition, deepwater fields were added as a new category to the Field Allowance which offers relief against supplementary charge Tax (SCT). This addition is seen as particularly important to the future prospectivity of the UK North Sea; providing an incentive to develop capital intensive deepwater fields.

Over the next five years, Norway and the UK are likely to see the development of a number of large projects. Statoil's Aasta Hansteen project is likely to require the highest investment in Norway. The project will be the first ever deepwater development in the Norwegian Sea and will see the deployment of the first Spar platform to be used in the country. The UK is also expected to inject significant Capex into

its offshore oil and gas fields, with Chevron's deepwater Rosebank field projected to require the largest investment.

Developments in Russia will drive activity in Eastern Europe, with Infield Systems expecting 91% of the sub region's Capex to be associated with Russian projects, of which the majority will be directed towards the Pipelines market. The Nord Stream and South Stream pipelines will account for a large proportion of the country's pipeline Capex. In Southern Europe, Italy could see increased levels of spend, particularly associated with Eni's offshore developments and Cyprus is also anticipated to become an emerging player.

In terms of operators, Statoil's increased level of investment in the UK and Norway is expected to propel the company to first place in terms of offshore Capex in Europe. The IOC is projected to inject a significant amount of money into the UK's offshore sector, with its Mariner and Bressay projects forecast to account for the largest share of its UK expenditure. Norway, however, will continue to account for the majority of the operator's Capex over the forecast due to a number of highly capital intensive projects.

The consortium comprised of Gazprom, Wintershall-BASF, E.ON Ruhrgas, Gasunie and GDF is anticipated to continue investing in its North Stream pipeline project, making it the second largest company to invest in the European offshore market. The potential doubling of the twin pipeline system will allow even more gas from Russia to be transported to Western Europe via the Baltic Sea.

Despite a forecast drop in expenditure, BP is likely to retain third position in terms of offshore investment over the next five years. Over a quarter of the operator's expenditure could be focused on its Schiehallion Quad 204 project, which will require the installation of an FPSO and subsea infrastructure.

Infield Systems expects a positive outlook across all market sectors, in particular the Pipeline market. Norway and the UK are likely to require the largest share of pipeline investment over the forecast, of which SURF lines account for the largest share due to the large number of projects which will require subsea infrastructure. In Eastern Europe, trunk and export line demand will outweigh other pipeline types.

In terms of offshore platforms, 62% of projected expenditure will be focused on the Fixed Platforms market. The UK is anticipated to see the largest number of fixed platform developments over the forecast and is also expected to dominate the FPS market; however, Statoil's Aasta Hansteen Spar platform is projected to require the highest investment for a floating platform over the forecast period.

Finally, the Subsea Completion market is forecast to see robust levels of investment, primarily driven by Statoil operated projects in Norway.

## Report Contents

- **Executive Summary** provides an overview of the European offshore oil and gas market highlighting the main points of the report and identifying the most crucial trends affecting the market.
- **Global Market Overview** provides an overview of current economic conditions in both developed and emerging markets, oil price trends and field sanction points, offshore production and reserves, as well as key industry trends, including the impact of unconventional and the growth of LNG on the global market.
- **Sector Analysis and Forecasts:**
  - **Fixed Platforms** provides an overview of the fixed platform market followed by a detailed discussion of key operators and developments. In-depth analysis of fixed platforms by country, by type (Piled, Suction Pile, Jack-up, Gravity/Jack-up, Gravity, Caisson, Unmanned Production Buoy), by water depth and by weight band is also provided.
  - **Floating Production Systems** contains a market overview as well as a detailed forecast for the FPS market, including Capex and number of installations by operator, by country, by type (Semi-Submersible, FSO, FPSO, Spar, Other Floaters), by water depth and by build. Key developments are also discussed.
  - **Subsea** includes a sector overview as well as a detailed forecast for the Subsea market, including Capex and number of installations by operator, by country, by sector (Equipment, Drilling & Completion) and development type (Subsea Tree, Subsea Compression, Subsea Separation, Manifold, Template), and by water depth. Key developments are also discussed.
  - **Pipelines and Control Lines** provides an overview of the sector and the key operators and developments. Further detailed analysis is then provided about pipelines by country, by market segment (Trunk/Export Lines, SURF, Conventional), by water depth, by material and by diameter, whilst control lines are reviewed by country and by type.
  - **Deep and Ultra-Deepwater** looks at the outlook for deepwater development in the region, including Capex projections by operator, by country and by sector (Platforms, Subsea, Pipelines and Control Lines). Key deepwater developments are also discussed.
  - **Specialist Vessels** provides in-depth forecasts for regional vessel demand (vessel days) and supply (units), including contract awards, for the major markets - Pipelay, Heavy Lift, Multifunctional (IRM, Construction Support) and Accommodation.

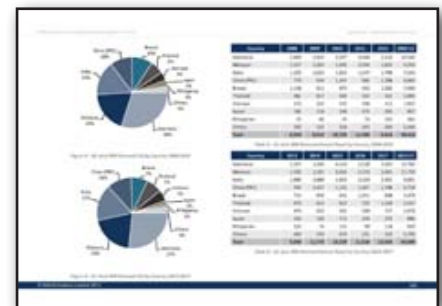
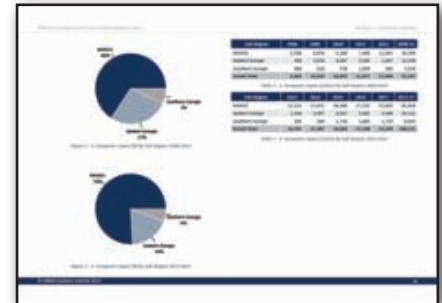
## Why You Should Buy This Report

- The report contains data developed by Infield Systems' market modelling process, OFFPEX, which is based on a unique "bottom up approach" to forecasting. OFFPEX's component by component and project by project forecasting process is robust and has a proven track record.
- The reader is given a comprehensive presentation of the offshore market in the Europe region with commentary and detailed analysis covering the macro economic climate right through to analysis by country and operator in terms of both Capex and number of units forecast to be installed.
- Detailed sector analysis appraising the variances in regional and country drivers for the European offshore oil and gas market, providing insight into the trends expected within the market over the next five years.

## Global & Regional Perspectives Market Reports

Infield Systems publishes a range of market reports covering various aspects and regions of the oil, gas, renewable energy and associated marine industries. Utilising comprehensive in-house project databases, industry models and research capacity these reports are widely used by industry analysts and professionals:

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- Subsea Well Intervention
- Remotely Operated Vehicles
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- Middle East & Caspian
- North America



## About This Report

Number of Pages:	270
Number of Figures:	278
Number of Tables:	89

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- Glossary, Acronyms & Abbreviations
  - Glossary
  - Product/Service Definitions
  - Abbreviations & Standards of Measurement

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