Subsea Well Intervention
Market Update Report 2010/14

The first edition of the Global Perspectives Subsea Well Intervention Market Update Report published by Infield Systems provides an in-depth analysis of the global well intervention market from 2005 to 2014 by using a detailed demand model and providing an in-depth review of current technology and future activity of key operators.

Riserless Well Intervention

Riserless Well Intervention (RLWI) has been performed on a regular basis by Statoil since 2003 and is a key element to reaching their increased oil recovery targets from subsea completed fields. With an ever increasing need to increase such recovery rates from all operators and a movement towards deepwater fields, the intervention market has the potential to become vital to any operator with a substantial mass of subsea wells.

This unique report discusses the potential requirement for well intervention services by applying a probability model across the global mass of subsea wells. Designed as a knowledge gathering tool, the report provides a detailed explanation of the history of the market. The report gives the reader a key understanding into the potential direction of this sector by analysing the driving factors behind the market, the potential well intervention demand and the potential solutions that have been deployed to service the market.

Subsea invention is growing in importance as the global installed base of subsea developments continues to increase. The operational base of subsea wells has been growing dramatically since the first use of subsea production wells in the 1960s. The key regional areas of subsea activity are the North Sea, where the vast majority are installed in water depths of less than 500m, the Gulf of Mexico, Brazil and West Africa.

Despite the obvious benefits to an operator’s increased recovery rate and lower capital expenditure, the intervention market has yet to take off. By taking a ground-up approach to analysis Infield are able to show how the technical limitations of equipment and inertia from operators play a key part in limiting growth and show how this is changing as more and more emphasis is placed upon this sector.

The Well Intervention report includes detailed information on intervention, inspection, repair and maintenance (IRM), subsea installations, the approach of various operators, contractors and equipment suppliers and strives to give insights into the key developments within the intervention and wider offshore oil and gas industries.

Based upon two proprietary databases, OFFPEX and the Specialist Vessels Database, the report presents both the supply and demand sides within this emergent market. Tracking each active vessel and the myriad of assets currently lying within shallows, a full analysis of the key players and their differing solutions is provided along with a detailed regional analysis. This makes the Subsea Well Intervention Market Update the most up-to-date, in-depth and detailed overview of a market that has the potential to become vital to the industry.

Why you should buy this report:

- Infield’s modelling process, OFFPEX, is based upon a “bottom up approach”. The component by component, project by project methodology is robust and has a proven track record.
- The Infield well intervention model is unique and is based upon the installed global subsea well base and forecast possibilities.
- The report contains the latest information on the plans of operators and contractors and presents a positioning analysis for both.
- Provides a detailed assessment of vessel utilisation and dayrate analysis.

Report Contents

- Executive Summary provides a comprehensive overview of the complete market sector.
- Introduction provides an in-depth understanding of the methodology behind the report and an overview of the market sector from a macro perspective. Analysis is provided into the history of the market from the first steps with Statoil through to the benefits of RLWI over the use of mobile drilling units.
- Well Intervention Demand provides a detailed forecast on well intervention, using a region by region analysis of the potential intervention market. Beginning with an introduction into the market demand and finishing with conclusions focussing upon the potential growth of the RLWI solution, the section provides a detailed analysis upon the current dynamics and the potential adaptation of the technology. Also included is a detailed analysis of the subsea installation and IRM markets which are likely to be part of each vessel’s working remit.
- Well Intervention Supply uses the growth of specialised vessels as a starting point, the supply section profiles those vessels that have been positioned to compete for well intervention demand. Providing a detailed assessment upon the merits of each vessel, and analysing the key link between technology and the vessel, the section provides a unique analysis into those looking to capitalise upon the opportunities presented within the demand section. Also provided is a detailed assessment into dayrates and utilisation figures derived from the understanding that a vessel is unable to be purely focussed upon intervention is provided.
- Vessel Utilisation & Dayrate Analysis is a detailed assessment into dayrates and utilisation figures derived from the understanding that a vessel is unable to be purely focussed upon intervention is provided.
- Appendices and Notes are included at the close of the report to give the reader further understanding of the unique models and how they were used to compile the report.

Please note report images are low resolution for inclusion in this brochure.
Specialist Vessels Market Update Report

Infield has also published a companion report to the Subsea Well Intervention Market Update, the Global Perspectives Specialist Vessels Market Update Report 2009/12.

The purpose of this report is to provide a comprehensive, ground up insight into the global offshore vessel market by providing an analysis of both sides of the supply and demand equation, with further more granular analysis of specific market sectors.

One key element of the report is that it highlights where there are perceived supply voids in the market, which occur when the current global fleet cannot satisfy demand. Analysis is provided to show the size and severity of these voids. The report also offers a specific focus upon the heavy lift, lay and IRM markets before going into detail for specific vessel types.

The Global Perspectives Specialist Vessels Market Update Report 2009/12 costs £2,200.00. Subscribers to the Subsea Well Intervention Market Update can upgrade to include the Global Perspective Specialist Vessels Market Update Report for an additional £1,000.00.

The Infield Energy Analysts

Infield is an independent energy research and analysis organisation that is dedicated to the provision of accurate and up-to-date data, market sector reports, mapping, analysis and forecasts to the offshore oil and gas and associated marine industries. Infield services clients in over 40 countries from a wide range of organisations including E&P companies, contractors, manufacturers, government agencies and the financial community. Infield is widely acknowledged as the definitive independent information resource and has been involved in many US$bn of merger, acquisition and transaction market due diligence.

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For upgrades to the Specialist Vessels Database, the Global Perspective Subsea Well Intervention Market Update, multiple copy discount and corporate wide licences please contact a member of the Infield Team for details.

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