

- Market forecasting & entrance strategy
- Global market reports
- Technologies, trends, future



### Global Coverage

Established in 1990, Douglas-Westwood is an independent employee-owned company and the leading provider of advisory services and business research to the top-tier players in the global energy industries. To date we have completed 700 projects providing our products & services to 400 clients in 70 countries. We have offices and research hubs in Aberdeen, Canterbury, New York and Singapore.

### The Leading OFS Advisors

Douglas-Westwood's experience in analysing the oilfield equipment and services (OFS) sector is market-leading. Our activities span upstream exploration and production both onshore and offshore, the midstream and downstream sectors from pipelines to refining, to petrochemicals.

### Our Knowledge Base

This covers leading-edge subjects including oil & gas supply, floating production, subsea production, deepwater production, IRM, onshore & offshore drilling, onshore pipelines and many more. We are noted for our knowledge of regions where it is difficult to access business information including China, the Middle East, East & South Asia W Africa and Russia, and of emerging markets and oil & gas technologies. Our in-house databases of industry projects are constantly updated by dedicated staff.

### Trusted Advisors

Our strategic advisory credentials range from work with oil majors to facilitating business strategy development for the world's leading oil & gas contractors. Activities include commercial diligence for institutional investors in public and private markets, including IPO support and M&A transactions.

*“ Douglas-Westwood are the  
sector study experts ”*

- Woodside Petroleum (Australia)

### Commissioned Research

Our experience of researching the sector is probably unequalled worldwide. Our clients range from the oil majors such as BP and Shell to contractors & technology suppliers such as Bechtel, Cameron, GE, FMC, Schlumberger and many, many more.

### Published Market Reports

Our acclaimed series of published market reports & forecasts are trusted by professionals in oil & gas companies, contractors, agencies of governments and investment banks. Our reports are used as a benchmark worldwide for the depth, scope and accuracy of forecasting providing clients with the unparalleled market insight needed to make sound business decisions.

### Recent subjects include:

AUVs and ROVs  
Deepwater Oil & Gas  
Floating LNG  
Floating Production  
Land Rigs  
LNG  
Middle East & North Africa OFS  
Offshore Operations and Maintenance  
Offshore Produced Water  
Onshore Pipelines  
Russian Onshore Oilfield Services  
Subsea Hardware  
Subsea Vessels  
UK Power Generation  
UKCS Offshore Decommissioning

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### Examples of DW's work in the sector include:

#### KCA Deutag -

Market and commercial analysis of the **land drilling, offshore drilling, and rig equipment manufacturing** markets, including review of forecast activity, asset quality and competitive positioning. DW provided opinion on the achievability of revenue projections.

#### Expro Group -

Detailed market and commercial review of the global **subsea intervention** and **well testing** sectors. Project included an analysis of competition, pricing metrics and service enhancement initiatives. DW worked closely with the Company to provide market and commercial insight which aided in the production of financial forecasts and earnings projections.

#### UK plc -

DW provided strategic guidance and led the diligence process for a \$1bn transaction in the **well services** sector. Mandate included a full commercial and market overview, including a business model review and an analysis of the potential impact on market valuation for the combined entity.

#### Stork Technical Services -

Full commercial diligence reviewing acquisition target RBG, an international **maintenance** provider to the offshore oil and gas industry. DW's project scope included a market review and outlook of activity levels; a commercial review considering pricing, competition, competitive positioning, client portfolio, client consultation, client retention; in addition to identifying and quantifying synergies.

#### KKR -

Market review for the acquisition of Bond Helicopters, a UK-based provider of helicopter personnel transfer services to the offshore oil & gas industry. DW's focus was to provide sensitised and scenario-based activity and pricing outlooks for the **UK helicopter services** market.

#### UK plc -

A market and commercial review which considered the acquisition of a **subsea product manufacturing** business. DW's scope included market outlook and forecasting, detailed review of competitive positioning and a commercial review on revenue sustainability and growth potential.

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