# INTSOK Norwegian Oil and Gas Partners

# 2013 Annual Report

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# **INTRODUCTION**

# Slowdown after period with record high investments

The global oil- and gas market has in recent years experienced strong growth due to increased demand for energy worldwide. Abundant new resources are opening up in deepwater and in oil and gas shale. The US energy revolution is far from the whole story. We are seeing historic energy sector reforms in Mexico. The Arctic has massive potential, but also practical and environmental challenges. Major discoveries may make East Africa an exporter of oil and gas within a few years.

The major oil companies have a substantial investment project portfolio. Some are slowing down their capital expenditure programs with disciplined use of capital. Cost discipline has become a priority; controlling project costs and reducing operating costs. The profit margin squeeze will call for more cost-efficient solutions. We are likely to see more focus on how technologies can unlock the cost-efficiency potential.

The activity level has been record high in Norwegian market in the last few years. The Norwegian petroleum cluster has still been able to grow its international business. The oil and gas industry has seen an average annual growth of almost 20 percent in international turnover since the turn of the century. Most of the turnover is linked to 20 leading firms, representing two-third of the international business.

The Norwegian Continental Shelf has always been open for foreign companies to invest and do business. This has ensured diversity and competition. The government has stimulated cooperation between oil companies, supply industry and the research institutions. This interaction has created a climate for innovation. Willingness to take risk, technological foresight and a competent workforce has pushed the Norwegian petroleum industry forward and laid the basis for the international expansion in the last decade.

Norwegian suppliers are at the forefront of oil and gas technology development and should be able to continue to capture market share going forward as exploration and new field development moves into deeper and deeper waters. But we also seeing buildup of competing clusters in other countries, assisted by governmental policies on local content and generous funding of R&D.

We will have to compensate with even higher competency and technology content to maintain our lead in the years to come. Many of INTSOK's partners have developed solutions, products and ideas which can contribute to future international success. Many small and medium-sized companies with niche products, technologies and services are experiencing breakthroughs in international markets.

The global markets are already important for employment in Norway and for their contributions to the Norwegian economy. Menon Business Economics has estimated that the petroleum industry is employing some 250,000 people in Norway. Exports from the offshore supply industry represent engage more than 70,000 employees and contribute NOK 28 billion in annual taxes to Norwegian economy. Most of the firms with international ambitions are INTSOK partners.

Brazil, UK, U.S. Gulf of Mexico and Korea are currently the four most important markets for the Norwegian petroleum cluster. Brazil and Gulf of Mexico have challenging deep water projects where our technology and competence is attractive. Korea has delivered a number of drilling rigs to Norwegian rig owners over the last few years where firms based in Norway have supplied the advanced drilling equipment. UK is a mature market which is the second biggest export market for the Norwegian oiland gas suppliers.

Asian yards have also won significant contracts for projects on the NCS. More of the Norwegian oil and gas suppliers must get to know the Asian players if they want to be involved in the projects. It can be a challenge to navigate successfully in a new global procurement process. The success criteria may be different.

INTSOK has therefore strengthened its capacity to assist partners. We have engaged experienced local

content advisors. We have released a major study on global procurement processes that addresses the way the Asian yards operate, and how to do business in the markets. The first phase of the project focused in the procurement processes for platform decks, floaters, production units and mobile drilling units built in Asia for the Norwegian Continental Shelf. We are grateful for the help we have got from Norwegian suppliers based in the Asian markets in developing the study.

INTSOK has highly competent local advisors in our priority markets. Their knowledge and extensive networks are used to assist INTSOK partners in gaining access to business opportunities and help them understand the markets in question.

INTSOK is following path that has been successful. We wanted to change our strategy slightly in 2013 with focus more on quality than quantity in the number of events we organise at home and abroad. It is a priority to provide in-depth insights into the market trends and technology. We will continue our focus on anti-corruption activities.

INTSOK welcomed 34 new partners in 2013 whilst 23 left us, giving a grand total of 230 paying partners. Our ambition is to open doors to the right customers at the right time for our partners. To achieve this we are focused on tailoring our activities even closer to companies at home and abroad.



Sjur E. Bratland Managing Director

## **Opening doors to the customers**

INTSOK is focusing its attention on the global markets which are most attractive to our partners. Priorities are discussed and decided by the INTSOK Board. The markets where we are active represent more than 70 percent of the total global offshore oil and gas production and more than US\$ 1 trillion in capital expenditure in the next four years.

INTSOK events have become excellent venues for meeting customers, exchanging views and experience. We have increased our focus on network meetings for partners both at home and abroad. We work extensively with Norwegian ministries, embassies and institutions like Innovation Norway, the Norwegian Centres of Expertise and GIEK who contributes to sound financing of international projects.

Many events have been ongoing for years and continue to attract high level speakers and large audiences.

- The annual Russian – Norwegian Conference was held for the 11th time in 2013. The event in St. Petersburg had focus on "Unlocking the High North potential together".

- The Annual US-Norway Technology Partnership Conference was held for the 15th time in Houston with focus on "Meeting the Challenges of Deepwater." The conference was a good illustration of the strong ties between the US and Norway in solving the deepwater challenges.

- The Pemex – INTSOK Deepwater Technology Seminar attracted a large audience from Pemex and the relevant players in Mexico, and enabled INTSOK partners to build networks and present their capabilities. The reforms in the Mexican petroleum sector will open the market further in the years to come.

- **Norwegian Days in Baku** was one of the major events in Azerbaijan in 2013 and laid the foundation for stronger Norwegian involvement in large projects to be developed in the years to come, like Shah Deniz phase 2.

- The International Oil and Gas Business Days were held in Stavanger during the ONS Norway event and attract a very good audience.

- The UAE-Norway Annual Technology Workshop attracted senior managers from the ADNOC Group of Companies.

- The 10th FPSO/FLNG event in Oslo attracted good speakers again and a strong audience.

The ambition is to organise key events at several locations in Norway in the years to come.

INTSOK has also been invited to organise events abroad. We were responsible for a technical session at a major event in Perth in Australia where focus was on floating production and subsea developments.

In Mexico we organised a HSE seminar in cooperation with the head of health, safety and environmental issues in Pemex Exploration and Production. 70 members of Pemex staff with background from a most parts of the organisation attended, providing excellent opportunities for INTSOK partners to build relationships and promote their capabilities.

Early 2013, INTSOK organized a network meeting regarding the situation concerning the contracts that had been awarded abroad. An activity plan was developed to assist the Norwegian supplier industry to better position to market themselves towards the oil companies/operator, the engineering partner and the constructor. INTSOK engaged actively in Statoil's meeting with the Norwegian supplier industry; Statoil presented opportunities both for their Norwegian projects as well as their Mariner project in UK.

INTSOK organized supplier meetings in Oslo and Paris with Total, Technip and Samsung where the three companies presented opportunities in the Martin Linge project for INTSOK partners.

INTSOK, in cooperation with Statoil and the engineering contractor CBI, organized supplier meetings to present opportunities in the Mariner project for INTSOK partners.

INTSOK, in cooperation with Det Norske, arranged a supplier meeting to look at the opportunities for involvement in the Ivar Aasen project which is under development. The meeting took place in Wood Groups offices in the UK. The EPC contract had been awarded to a yard in Singapore with the Wood Group as engineering sub contractor.

Asian yards represent a significant portion of the export value from the Norwegian petroleum cluster. INTSOK has therefore had high focus in developing relations to the most important yards in South Korea, Singapore and China. INTSOK brought Norwegian companies to the yards in 2012 to enable them to build relations. In 2013 INTSOK organised network meetings and got the oil companies and engineering companies to present projects where Korean yards were involved. Network meetings with Statoil and Total were used to present current projects and share lessons learned. Partners have also shared experiences from working in the Korean market.

The Norwegian Crown Prince and Princess visited Houston during the annual OTC conference, accompanied by the Petroleum and Energy Minister, Mr. Ola Borten Moe. They opened doors for the Norwegian oil and gas industry which always well represented at OTC.

## More focus on network meetings

INTSOK has organised more network meetings for partners than ever before and more workshops where leading oil and gas companies presented their projects and requirements. The goal has been to enhance the quality of the networks, stimulate cooperation and interchange exchange between small and large partner companies. The number of network meetings has more than doubled from previous years. Participation of INTSOK partner companies has increased as well.

INTSOK has organised network meetings in Abu Dhabi, Angola, Australia, Brazil, USA (Houston), Kazakhstan, Malaysia, Mexico, Oman, and Qatar as well as in Norway. The networks have been actively used to stimulate exchange of experience from the markets, and provided INTSOK with an opportunity to discuss its strategy in the markets. Qatar Petroleum sent 55 of its staff to a workshop for partners in Qatar. More than 40 companies attended a network meeting with Douglas Westwood in Houston.

We have enabled companies to meet with important customers like ADNOC, Pemex, Petrobras, Sete Brazil, Sonangol and the new shipyards in Brazil. Companies have discussed a wide range to themes relevant to the different markets, like how to do business in the countries, market trends, financing, HSE, as well as integrated project management. East Africa is growing in importance with the large deepwater natural gas discoveries in Mozambique and Tanzania. INTSOK hosted lunch and network meetings with Ministers from Mozambique and Tanzania during their visits to Norway. The events were an efficient way to communicate capabilities and market strategies from a group of partners to Ministers in new potential markets. INTSOK also visited Tanzania with partners to get further insight into the future market opportunities.

Gazprom, KazMunaiGaz, Petrobras, Saudi Aramco are among the national oil companies that have visited Norway and met with partners. Many of the companies have been interested in health, safety and environmental protection issues.

The high level delegation from Saudi Aramco met more than 50 Norwegian companies during the visit which can be described as a milestone in Saudi Arabia's cooperation with Norway. Saudi Aramco is drilling in the challenging deepwater in the Red Sea where Norwegian companies can make major contributions.

## Providing high quality market insights

The annual market report is seen by the partners as one of our most important contributions. It has become a tool for partners to access high quality insights into market trends. Rystad Energy has developed the report for INTSOK over several years. Rystad has since it was established ten years ago become one of the world's leading energy information suppliers and tracks all major global projects and over 1000 companies on an ongoing basis.

The 2014-17 report provides detailed information of 19 markets which are prioritised by INTSOK into three categories;

- Main markets
- Other priority markets
- Markets under observation

The main markets reflect partner's priorities and include Angola, Australia, Brazil, China, Korea, Russia, the UK and the U.S. Gulf of Mexico. Angola is a newcomer in the group due to many deepwater projects under development.

INTSOK is also giving significant attention to markets like Azerbaijan, Canada, China, Kazakhstan, Malaysia, Mexico, Saudi Arabia and the United Arab Emirates, as well as yards in Singapore.

East Africa has been included for the first time as markets under observation. Activities in India, Indonesia, Ghana, Nigeria and Qatar are also in that category. INTSOK's markets represent more than 70 percent of global offshore E&P spend in the period to 2017. The targeted markets are expected to grow by 4-5 percent annually over the period. INTSOK expect slightly slower pace in spending than in the past few years as a result of increasing costs and uncertainties about future oil and gas prices. Many of the major oil companies have announced that they will reduce their spending compared to recent years. The fundamentals for long-term growth are however still in place.

The market report also analysis the global macro economic outlook. The implications of the shale developments are very interesting in the global supply picture, and the market report has a chapter that focuses on onshore developments in North America. Rystad Energy forecasts North America to reach self-sufficiency for liquids in ~2020. This will have large geopolitical impacts.

The market report also has a special chapter on floating production systems and the rig market, as well as an analysis of the role of the Norwegian petroleum cluster.

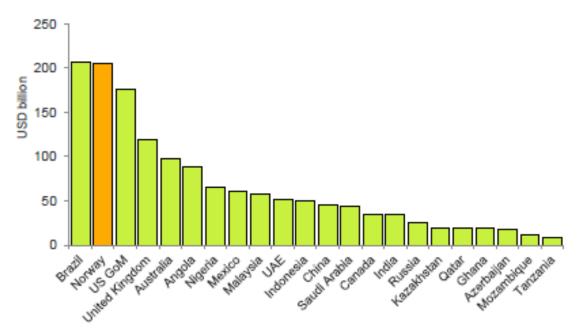
Brazil is forecasted to be the largest offshore market followed by Norway, the U.S. Gulf of Mexico, UK and Australia. The Brazilian market is forecasted to be US\$ 206 billion over the period, while the Norwegian market is forecasted to US\$ 205 billion and US GoM to US\$ 175 billion. Brazil has been high on INTSOK's agenda for several years and we have been able to develop excellent relations to Petrobras, the regulatory body ANP as well as Sete Brazil which has an important role in financing the huge rig program. Rystad Energy is expecting a continued push into deep waters. The subsea sector will as a result become the fastest growing segment, and almost double towards 2017. Brazil, US GoM, Angola, United Kingdom, West Africa and Australia are expected to be the largest subsea markets towards the end of the period under consideration.

Significant growth is also expected in the EPC and Topside Equipment, Operations and Well segments. Brazil and US GoM are expected to be the largest well markets moving forward.

The FPS market has been dominated by spending on Floating, Production, Storage and Offloading (FPSO) units. The market reached a high of around US\$ 15.8

billion in 2012. Moving forward, the market is forecasted to increase to around US\$ 32 billion in 2017, primarily driven by increased spending in the FPSO and FLNG segment. FLNG is expected to be dominated by Australia in the first few years, followed by increased activity in Asia, Middle East and Africa.

INTSOK has developed reports on how to do business in key markets like Angola and Brazil that are available for partners on the INTSOK web. INTSOK has also commissioned a major report on how to succeed in the U.S. market with extensive discussion on lessons learned from firms that have operated in the market for a long time.





Source: Rystad 2013

# Meeting the challenges of the High North

The Arctic continental shelf is expected to be an area with high potential for discovering oil and gas. The industry's capability to provide technology meeting the severe climate conditions, environmental demands, presence of ice and long transport distances may be one of the major obstacles to explore the potential. The high cost of offshore field developments is also a major hurdle.

We must have the necessary technology to operate in vulnerable Arctic areas to develop the High North as a future energy province.

INTSOK launched the RU-NO Barents project in 2012 with support from the Norwegian Government and Norwegian and Russian oil and gas industry. High North project is the largest project INTSOK has ever undertaken in any market worldwide. It is seen as a strategic project for both countries, with active participation of government and industry from both countries.

More than 40 companies from both countries are involved in the work. 250 companies have participated in the workshops. The project has been able to align the cross border understanding of the Arctic Challenges. It has identified technology and solution providers. It has identified the need for innovation and technology development, and the current gaps. The program has strengthened the industrial links between the two countries. The RU-NO Barents Project focuses on five major areas, which are all crucial to the development of potential resources. The five focus areas are:

- Logistics and Transport
- Drilling, Well Operations and Equipment
- Environmental Protection, Monitoring Systems and Oil Spill Contingency
- Pipelines and Subsea Installations
- Floating and Fixed Installations

The working groups have concluded that there are considerable measures to be taken by authorities, oil and gas companies and the manufacturing industry before exploration and extraction of oil and gas can be executed in a safe and environmental sustainable manner in the High North.

Significant amounts of environmental data exist today, but data for areas which are not open for exploration is not publicly available to the industry.

It is a need for a set of mandatory requirements to ensure future safe maritime operations in the Arctic waters. It is a need for harmonizing training requirements across the borders. The industry has to address Arctic storms, icing on vessels and installations, fog during summer, darkness during winter and long distances. Infrastructure, including communication possibilities, is poor. Technology exists today to allow safe and responsible drilling operations using floating systems in the open waters of the Barents Sea. Technology also exists to allow safe and responsible drilling operations in shallow water with ice conditions almost the year around by using bottom founded structures.

Safe, responsible, and cost effective drilling operations in the medium to longer term will require significant advancements in technology in selected areas to achieve feasible and cost effective solutions. Efforts to realize the required technology should be started now to be available when needed by the industry, technologies like topsides and systems capable of operating in temperatures below -40C.

The RU-NO work has shown that creation and harmonization of rules and regulations, standards, classification and approvals cross border is important to have a consistent practice and HSE outcomes for Norway and Russia.

Education and training efforts at professional and skilled labor levels should be emphasized to ensure

the objectives of a safe, environmentally friendly and economically viable exploration and development of offshore oil and gas resources in the High North.

The task force looking at the environmental protection, monitoring systems and oil spill contingency will deliver their recommendations in 2014.

The pipeline and subsea task force is also developing their recommendations for operations that present specific challenges to the subsea development; like long distances reduced accessibility due to ice cover or icebergs, remote areas, lack of infrastructure and environmental sensitivity.

The partnership and cooperation in the RU-NO project has created possibilities for exchange of expertise, knowledge and experience and technology. RU-NO's work has been presented at more than ten conferences in Norway and Russia where the Arctic challenges have been a theme.



# Partners are satisfied with INTSOK's contributions

Menon Business Economics has evaluated INTSOK's performance on behalf of the Ministry of Petroleum and Energy. INTSOK was established by the industry in partnership with the government as a foundation in 1997. INTSOK is funded through financial contributions from the Ministry of Petroleum and Energy and from the partners' membership fee. The Ministry has been evaluating INTSOK regularly since the foundation was set up.

Menon's conclusion is that INTSOK is a well established and well functioning organisation for promoting the Norwegian based offshore supply industry. The partners' active use of INTSOK is seen as proof that it is delivering services and products that have a value for the partners. INTSOK's employees are seen to have high technical competence and long experience from the oil and gas industry. A majority of the firms are seeing INTSOK's contributions as one of the main reasons for their strategy to go international.

Menon's analysis is emphasizing a need for closer coordination between INTSOK and INNOVATION Norway. INTSOK agrees to that and has started a dialogue with INNOVATION Norway. INNOVATION Norway is also attending INTSOK's board meetings as an observer. Several events have been organised and implemented in partnership with INNOVATION Norway and other Norwegian organisations, like the Norwegian Centres of Expertise.

A majority of companies working internationally are INTSOK partners, indicating that they are offered

services relevant for their internationalisation strategy.

Partners' feedback is that the membership has contributed to their ability to move into international markets. Members give INTSOK a score of 4.3 as average on a scale from 1 to 6, and where 6 are the highest score.

Menon's research also shows that members are satisfied with INTSOK's choice of priority markets and the themes which are in focus.

A report in 2011 showed that 98% were satisfied with the priorities of countries. Menon's in-depth interviews indicate that partners are satisfied with the geographical focus areas. INTSOK is recognized for its ability to be an early mover into new markets, like South Korea. Partners are also satisfied with INTSOK's ability to open doors to potential clients and the quality of the international advisors.

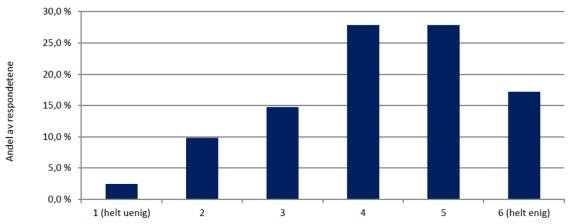
INTSOK's market information reports get top score. 95% is using the service actively. Workshop and client meetings also get a very high score.

Menon has asked the partners what they would like to prioritise going forward. The response shows that 1)market information,2) workshops, 3)client meetings and 4)the door opener role are topping the list.

Smaller and medium sized companies are more satisfied than the large firms which tend to have with more in-house capacity to analyse markets and have more people in the countries. Larger firms say they benefits from INTSOK's services, like the dooropener role. Network meetings are seen as providing relevant knowledge (78%). Workshops and client meetings have opened the door to new business opportunities, according to 79% of the responses.

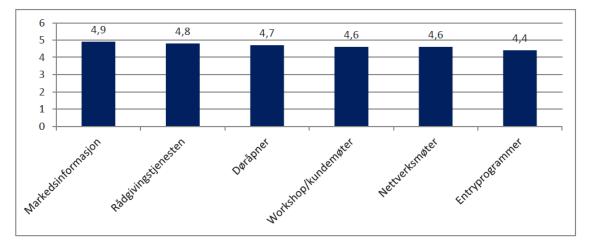
Menon's interviews with partners show that high competence is one of INTSOK's most important strengths. 70 percent of the respondents say that INTSOK has contributed to the internationalisation of their company. The average score is 4.1. Menon finds the feedback impressive with the small resources INTSOK have available for support of the petroleum cluster. Menon has therefore interviewed a number of the firms and got the same response; INTSOK has played an important role in their internationalisation.

Menon's conclusion is that INTSOK has contributed to the growth in international turnover in the Norwegian oil and gas industry.



INTSOK har bidratt til å øke internasjonaliseringen





Source: MENON 2013

## Advisors provide valuable assistance

INTSOK has increased its advisory services significant in recent years. The advisory activities have grown from 180 advices provided in 2006 to more than 550 in 2013. We have more capacity to cover the markets, and we have developed more local capacity by recruiting experienced people in the priority markets. We are increasingly trying to tailor our services to the needs of the partners.

INTSOK local advisors offer a wide range of services to partners. They know their markets, the business culture and they have access to the most important clients.

The Menon report shows that partners are very satisfied with the services.

Australia, the US, China, Brazil, Russia and the United Arab Emirates rank at the top of the number of advises provided in 2012 and 2013. The new advisor in Korea was recruited in 2012 and has been actively used. INTSOK has recruited a new advisor in Saudi Arabia with long experience and a strong network in the country. INTSOK may also add an advisor in Azerbaijan where the capital expenditure will be growing substantially in the next few years.

The advisory services in Indonesia have not been a priority among partners and the contract with the local advisor was not extended.

The advisors monitor their markets and assist partners in accessing the right customers at the right time. Most of the advisors travel to Norway once or twice every year to visit partners. The visits are important. It gives them an insight into the companies' requirements and priorities, and it leads to discussions on how they can add value. They have met with close to 200 companies during their stay in Norway in 2013.

INTSOK partners are increasingly using the services, the networks and the experience of the international advisors, but they can still be more active in seeking their help.



# **Catalogues are documenting partners' capabilities**

INTSOK has over the last few years developed a set of catalogues documenting the partners' capabilities. The catalogues have been an important tool in dialogue with potential clients in the markets. The catalogues are updated regularly.

# Equipment and systems for FLNG, FPSO's, service vessels & MDUs

Norwegian based technology has a well established reputation and a significant market share in the global fleet of FLNG's, FPSO's, TLPSs, SPARs, Offshore Drilling Units and Offshore Service Vessels. The catalogue presents the cluster of partners that provide products and services towards this market.

The purpose of this catalogue is to facilitate a joint effort from the Norwegian based industry to promote the cluster capabilities towards:

- Oil companies
- Engineering contractors
- EPC contractors
- Major shipyards
- Rig/ship owners

#### **SURF** Catalogue

INTSOK recognizes the increasing importance of applying subsea solutions in developing offshore, and in particular, deepwater oil and gas discoveries. INTSOK has compiled a SURF capability catalogue to assist partners in the Subsea, Umbilical Riser and Flowline cluster. The catalogue is a description of Norwegian based suppliers and service providers, providing equipment and systems for subsea field developments sorted in the following categories.

- Engineering & Technical Services
- Subsea Production Systems
- Umbilicals & flowlines
- Marine Operations & Intervention

#### **Capabilities in IOR**

The term "Improved Oil Recovery" (IOR) is used by INTSOK for all measures which can increase or accelerate the oil recovery of a field. There is emphasis on measures based on information gathered during production, and on measures based on advanced technology. INTSOK partners supply equipment and services within all major technical disciplines related to IOR.

#### The Geoscience & Reservoir Engineering Catalogue

The Geoscience & Reservoir Engineering Catalogue transcends disciplinary boundaries and highlights a balanced mix of the geoscience value chain covering exploration, exploitation, appraisal and development of hydrocarbon resources.

The industry's expertise is shared through success stories cover the value-chain allowing interested parties to discover a wide range of Norwegian leading technology.

The catalogue aims to improve knowledge of this industrial cluster and reflects the international nature of the petroleum industry, as well as mapping and presenting the competencies and capabilities of the geological, geophysical and reservoir engineering companies and institutions in Norway.

#### **Solutions for Cleaner Production**

The catalogue highlights INTSOK partner companies that deliver solutions, technologies and services which contribute to cleaner production and thereby reduce the impact of oil and gas production on the environment. Norwegian R&D institutions, suppliers and service companies have played a significant part in delivering the systems and equipment required to meet new standards. Today, the production on the Norwegian Continental Shelf (NCS) is at the forefront in using technological solutions that minimize the impact on the environment.

## **INTSOK BOARD**

**Chair of the Board** Pål Helsing, Kongsberg Oil and Gas Technologies

Vice chair Torgeir Kydland, Statoil

#### **Board members**

Monica Bjørkmann, Subsea 7 Åsmund Bøe, Aker Solutions Grete Fossli, Norwegian Confederation of Trade Unions (LO) Yrjar Garshol, Rolls-Royce Marine Odd Sverrre Haraldsen, Ministry of Petroleum and Energy Vibeke Bals Borge Håverstad, Cameron Sense Birgit Løyland, Ministry of Trade and Industry May Britt Myhr, Sintef Ola Storberg, Ministry of Foreign Affairs Harald Solberg, The Norwegian Shipowner's Association

#### PARTNERS

230 Partners pr. 31.12.13

4 Subsea AS 7 ocean AS **ABB AS** Abbon AS **Aptomar AS** Ace Oil tools as **APIteq (tidl ActionPhoto International AS)** Add Energy Group AS Advokatfirmaet DLA Piper Norway DA **Advokatfirmaet Mageli ANS AGR Drilling Services Holdings AS** Aibel AS **Air Energy Norway AS Aker Solutions ASA Akvaplan-NIVA AS** Alfsen og Gunderson AS **Align - Eureka Pumps AS Align - Fire Protection Engineering AS** Alustar AS Amitec AS **Aquateam Norwegian Water Tech. Centre AS Apply Leirvik AS AS CONNECTOR** AS Trans Construction (ATC) **ATCD Autronica Fire And Security AS Axess AS Bandak Group Beerenberg Corp AS** Palfinger Dreggen AS **Bergen Region Bergen Bilfinger Industrier Norge AS Bolt Norge AS** 

**Bredero Shaw Norway AS Bring Logistics AS BVS AS BW Offshore Cameron Sense AS Camo Software AS Carbon Limits AS Ceragon (former Nera Networks AS) ClampOn AS CMA CONTIKI AS Computational Industry Technologies (Computit)** ControlCutter Cre8 (Cre8 System AS) **D&H Solutions AS DeepOcean ASA Delta-P Pumpe og Kompressorsystemer AS DNB Bank ASA DNV (Det Norske Veritas) AS DOF Subsea Norway AS Dovre Group (tidl. Dovre International) Dresser-Rand AS E** Innovation **eDrilling Systems AS Eksportkreditt Norge Ellingsen Nor Instruments EMAS AMC AS** EMGS (ElectroMagnetic GeoServices) **Enwa Water Treatment AS** Exprosoft **Ferguson Norge AS Firenor AS Fishbones FMC Kongsberg Metering AS FMC Technologies Subsea System AS FORCE Technology Norway AS** 

Frank Mohn Flatøy AS **GANN Mekaniske AS GasSecure AS** Gassnova SF GE Oil & Gas (tidl. Vetco Gray Scandinavia) **Geomec Engineering** Gexcon **GIEK Glamox International ASA** Glava AS **GMC HVAC AS Greater Stavanger Economic Development Grenland Group ASA GS-Hydro Norge AS** Wärtsilä Oil & Gas Systems AS **HERNIS Scan Systems AS** High North Center for Business, Høgskole i Bodø **Hitec Products Gruppen AS** Honeywell **Höegh LNG ICD Software AS** Industrial & Financial Systems (IFS) **IKM Group IK Stavanger as Imenco Engineering AS Inflow Control AS** Ing. Per Gjerdrum Inmaco AS **Inocean AS (Anchor Contracting)** Institute for Energy Technology (IFE) **Interwell (former PI Intervention AS) IOS InterMoor AS IRIS AS Island Offshore Subsea AS iSURVEY GROUP AS** Jotun AS **K. Lund Offshore AS Kongsberg Maritime AS** 

**Kongsberg Norcontrol It AS** Kongsberg Oil & Gas Technologies AS (KOGT AS) **Kvaerner ASA Light Structures AS** Linjebygg AS **LMG Marin AS Malthus AS Marine Aluminium AS Marine Cybernetics AS** MARINTEK Markleen AS **Memfoact AS Mento Service AS M-I Epcon AS** Miros Moss Maritime a.s. Multi Phase Meters AS (MPM) **Multiconsult AS Nature Technology Solution AS** NCE Maritime/Ålesund Kunnskapspark **Nexans Norway AS NLI Solutions Norconsult International AS NOREQ AS NorLense AS NORSAFE AS NorSea Group AS Norshore Management AS Norske Ventiler AS** Norwegian Centre of Expertise Subsea (NCE) Norwegian University of Science & Technology **Novenco AS Lithicon Norway AS** NYMO **Norbit Subsea AS Ocean Maxwell AS Octio (former Hexio Group) Odfjell Drilling AS** 

**IHS - ODS-Petrodata Oiltec Solutions AS Oiltools AS ONS (Offshore Northern Seas) Onsite Treatment Technologies AS OSM Offshore** Parat Halvorsen AS **Parker Maritime AS Petrell AS** Petroleum Technolgy Company (PTC) **Petrolink AS Pon Power Scandinavia AS ProAnalysis AS Promineo Prosep Norway AS QuickFlange AS Rapp Bomek AS READ Group AS REINERTSEN AS Remora ASA RESMAN AS Prediktor AS Polytec R&D Institute Rogaland County Council Rogaland Training & Education Centre (RKK) Rolls-Royce Marine AS Roxar ASA Rxt ASA - Reservoir Exploration Technology ASA Rystad Energy** Safeclean Safety Tools Allmet AS Sandvik Riser Technology AS **SAR AS Scanseis Consultant Group AS Scan Tech AS** Scana Industrier ASA Lloyds Register Consulting Energy AS Seabox

**Sekal Sensor Developments Sevan Marine ASA** SHAREcat AS Shell Technology Norway AS Siemens Oil & Gas Offshore AS Siem Offshore AS **SIMONSEN VOGTWIIG SIMTRONICS ASA SINTEF Group** SINTEF Petroleum Research **Soiltech AS Solberg Scandinavian AS SPT Group AS Statoil ASA** StormGeo AS Stream AS **StS Gruppen AS STX OSV AS** Subsea 7 Norway **Subsea North AS Subsea services AS Tampnet Tamrotor Marine Compressors AS Technip Offshore Norge AS Techno Dive AS** Tecni **Tennaris Global Service Norway AS TESS** as **Thermtech AS TORGY MEK INDUSTRI AS Trac ID systems AS Trelleborg Offshore AS Tschudi Shipping Company TTS Group ASA Ulstein International UMOE Schat-Harding Group AS Uniteam International AS** 

Unitech Offshore AS VBS Consult AS VECTOR AS Verande Technology AS Wellcem Wikborg, Rein & Co Willhemsen Technology Solutions Xait AS Zenitel Norway AS Øglænd System AS

# PROMOTING NORWEGIAN OIL AND GAS CAPABILITIES IN INTERNATIONAL MARKETS

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