

Business opportunities
in the oil and gas industry
In-Country Value

18 December 2013, Sultanate of Oman



الفرص الاستثمارية في
قطاع النفط و الغاز
القيمة المحلية المضافة
١٨ ديسمبر ٢٠١٣، سلطنة عمان



SME development in HSE advisory services

18th of December 2013

Presented by:



الشركة العمانية للغاز الطبيعي المسال ع.م.م.
Oman LNG L.L.C.



Safety briefing and lodging



Emergency contacts

Mr. Kashif - loss prevention manager - Mob : 98089044

Emergency alarm / fire drills

Fire drills, emergency alarms (if any), assembly points to be announced by then hotel loss prevention staff

Prayer rooms

ladies prayer room & gents Prayer room are located in the Third floor

Toilets

available in Oman Auditorium & Boshar area

Coffee / tea

Provided outside the workshop room

Arrangements for smokers

allowed only outside the hotel Promises

Meeting agenda



1. Purpose of this workshop
2. Context and background
3. Scope of the opportunity
4. Industry Data
5. ICV creation through the opportunity
6. Specifications
7. Key ICV elements
8. Targeted parties
9. Contact details
10. Q&A session



Purpose of this workshop

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- To share the scope of one of the priority opportunities with the business community
- To register interest of the business community
- To set an initial dialogue between the oil and gas industry and business community
- To exchange ICV development best practices
- This workshop is NOT an contractual commitment with any business entity

Next steps

- Business community to register interest by reaching the presenter or the PMO
- Oil and gas industry to reach registered parties for follow-up dialogue and implementation

More information on the ICV blueprint or on other opportunities could be found in the brochure and catalogue distributed today or by visiting www.incountryvalueoman.net

Context and background



Background & Introduction

- The local market expertise in Health, Safety and Environment Advisory.
- HSE standards (Oman legislation) provide basic HSE requirements compare to international Oil and Gas industry requirements.
- Lack of consistent HSE regulation across different sectors of the industries in Oman

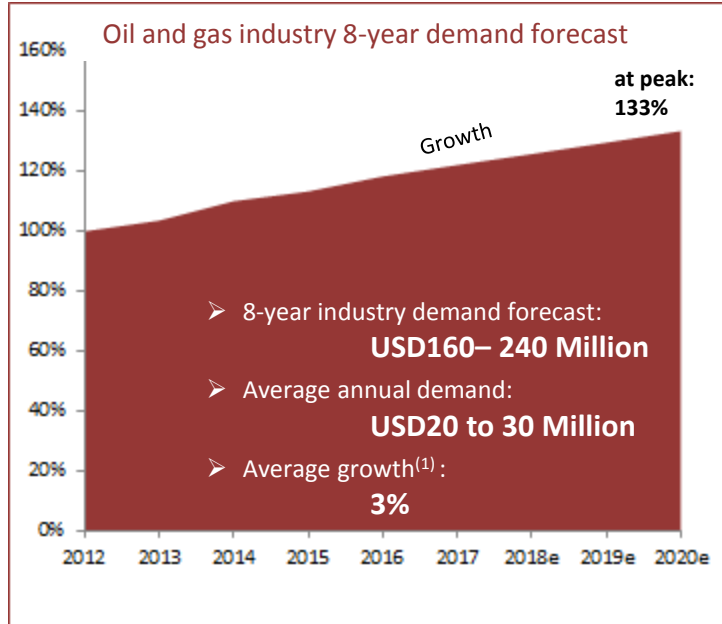
Objectives:

- To promote the creation of SMEs on HSE advisory
- To sharing knowledge/experience to new professionals in the market for SMEs.
- To support the government to form an advisory body – that can add credits and strength to aspiring SMEs.
- Initiate an local industry wide discussion to define the feasibility for standardizing the HSE requirements/practices across the oil and gas industry.

Industry demand data



Industry demand data was the main trigger for the development of the opportunity



Category Overview – Fire, Safety and Environmental Equipment and HSE Advisory

- Industry demand over the next eight years for fire, safety and environmental equipment and HSE advisory is between USD160 to 240 Million
- Demand for HSE advisory is between USD1 to 40 Million
- Currently the local market only addresses a very small portion of the demand
- The category is highly applicable across different industries outside the oil and gas sectors
- Most of the services are provided by former operators HSE professionals or external audit companies

(1) CAGR: compound annual growth rate

Scope of the opportunity



Category - HSE Advisory & Inspection

Description:

Support and develop Small Medium Enterprises (SMEs) in Health, Safety and Environment (HSE) Advisory to meet the demand on HSE Advisory Services.

Scope of the opportunity:

- HSE Management Systems & Culture
- Major Hazard Management
- HSE IT Software
- Process/Technical Safety
- Environmental Studies
- Emergency Response

- Capital Projects
- HSE Training & Competency Accreditation
- Site Inspection & Auditing
- HSE Equipment Inspection & Maintenance
- Occupational Health Services
- HSE Audit & Certification

Out of Scope:

- Contractual commitment with SMEs
- Direct funding

Scope of the opportunity



Category - HSE Advisory & Inspection

Constraints:

- Absence of HSE Advisory Body
- SME's limited in budget
- Commitment/capability from SMEs
- Limited Local training facilities
- Language Barrier (English)
- Local HSE culture/practice
- Proactive enforcement body
- Local Competency & Relevant Experience in Oil & Gas fields
- Expectations high at customer side – HSE being core value

Technical Specifications



National and International Sources for HSE Specifications (but not limited to):

- Omani HSE legislation
- ROP Civil Defense
- International Organization for Standardization (ISO)
- American Petroleum Institute (API)
- Occupational Health and Safety Assessment Series (OHSAS)
- National Fire Protection Association (NFPA)
- International Association of Oil and Gas Producers (OGP)



ICV creation through the opportunity

We are expecting that this opportunity would increase ICV by:

Potential job creation related to the opportunity

Job creation within SMEs

Potential ICV related to the opportunity*

ICV creation through SME development

Feasibility of implementation

High feasibility

Impact

- Disseminate Oil and Gas HSE standards to other areas such as: construction, workshops, factories, warehouses, transportation, offices, care homes, etc.
- With intense pressure from government and public, and the progress of the manufacturing industry, the demand is likely to increase in Oman and across the region
- Its impact on employment is important as a high level of Omanization can be obtained in mid to high jobs

Feasibility

- Know-how is detained by operators' HSE employees, encouraging spin-off should allow transfer of expertise. Experienced expats will be required only in advanced activities, specially in unconventional Oil and Gas, through outsourced consultancy or freelance work
- Continuous training of the workforce is required to stay up-to-date with the latest evolution and methods
- Low investment is required to launch HSE advisory

Key ICV elements



Components of Relevant ICV Elements

- 1) Investments in Fixed Assets
- 2) Omanisation in the Workforce
- 3) Training of Omanis
- 4) Local Sourcing
- 5) Local Supplier Development
- 6) Investments in National Institutions (R&D)

Target parties



- SMEs
- Local EPC contractors
- Local fabrication workshops
- Local assembler
- Local suppliers
- Local entrepreneurs

Contact details and support



Operators support:

- Assigning Focal Points to support SMEs
- Create opportunities for field exposure
- Training and coaching of SMEs' HSE professionals

Other stakeholders:

1. Petrogas
2. PDO
3. OGC
4. Oxy
5. Daleel
6. BP
7. Orpic
8. OOCEP
9. OPAL
10. MOG

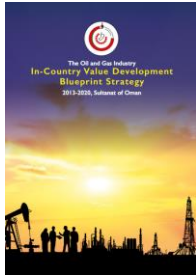
ICV PMO contact details

Website: www.incountryvalueoman.net

Materials and follow-up



For more information:



Brochure



Catalogue of opportunities



Website

For follow-up:

Register interest by contacting the PMO on: www.incountryvalueoman.net

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Thank you for your contribution!

Our mission:

***Developing a competitive and sustainable local supply
market... Together!***