

Offshore & OSVs Market, Trends & Classification

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ABS Market Share in Offshore

		Jackups	Drillships	Semi- subs	Sub- mersibles	Total	Market Share
Existing & Current Offshore Units	ABS	496	98	130	2	726	74.0%
	DNV	36	56	89	0	181	18.5%
	LR	9	1	4	0	14	1.4%
	BV	3	5	5	0	13	1.3%
	Other	37	0	10	0	47	4.8%
	TOTAL	581	160	238	2	981	
	ABS Share	85.4%	61.3%	54.6%	100.0%	74.0 %	



Deepwater Production



ABS

Source: Infield

Offshore Unit Populations by Type

- Population of offshore units by type including both existing and on-order as of 1Q 2013
- OSVs both new and on order account for more than 4,500 vessels (excludes <60m LOA <10m Beam)





Subsea Wells Increasing

- Drivers for subsea support vessels of all types
 - Growing number of subsea wells needing workover
 - Growing number and complexity of subsea pipelines
 - More hardware going subsea
 - ROV support, construction, Inspection, Maintenance & Repair (IMR)





OSV World Fleet: Diversity Increasing





OSV World Fleet



Source: Fairplay Shipdata May 2013



Today's OSVs

- OSVs today's designs are larger, more powerful and multi-purpose
- Larger and faster OSVs needed to meet the support demands of going farther offshore to support deepwater drilling and subsea operations

	Legacy Boats	New Generation Deepwater Boats			
Length	57m – 70m	67m – 130m +			
Brake Horsepower	4,000 - 15,000	8,000 - 45,000			
Winch Rating (tons)	80 - 300	250 - 600			
Dynamic Positioning	NONE	YES – DP-2			



ABS OSV Rule Enhancement

- A stand-alone, consolidated set
- Addresses current industry trends
- Consolidates existing Rule requirements
- Requirements developed for new service types





New Developments

- Support offshore alternative energy
 - Wind turbine installation, maintenance and repair
- Environmental considerations
 - LNG as fuel
 - Power and propulsion system optimization for reduced fuel consumption
- Support offshore oil and gas exploration and production in Arctic and sub-Arctic waters
 - Arctic OSVs
- Development in Brazil pre-salt fields
 - Doubled need for OSVs till 2020









Function Combinations

- Economic motivation
- Safety principles
 - Keep dangerous machinery away from personnel
 - Keep HNLS away from personnel
 - Keep HNLS away from ignition sources and heat
- Technical feasibility

Service Area	Functions					
Support	WI/WS/ WT	Wind-IMR	Heavy Lift	Pipe Lay/ Cable Lay	AH/Tow/ Escort	Dive/ROV
Transport	Crew	Non-hazard	Pollution only	HNLS		
Emergency Services	SSR	OSR	FFV			



Coordination of Multiple OSV Notations



Trends in OSV Class Notations



Dynamic Positioning, enhanced DP notations





Habitability: HAB(WB), HAB+(WB) or HAB++(WB)



IACS UR Polar Class: PC



Summary & Conclusions

- The Offshore market is predicted to stay strong, especially deepwater developments
- Increased numbers of deep-sea production sites and subsea wells will drive demand for capable OSVs
- ABS Rules and Guides have been developed to provide the appropriate notations for todays modern OSV designs and systems
- All ABS Rules & Guides are available for download free of charge on the ABS website at www.eagle.org

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		# Title				Comments	Pub Dat	te Last Update
		Generic Rules for Co Surveys After Constr	onditions of C uction	Classification, Materi	als and Welding, and	Effective Jan. 2013	2013	Mar-14-2013
		→ List of ABS Notati	ons and Sym	bols			2013	Apr-18-2013
		Supplemental Guide	s for Optiona	I Class Notations			2007	Jun-13-2012
	169	Floating Offshore Lie	uefied Gas T	erminals			2010	Jun-06-2013
	27	Approved Listings						May-28-2013
	27	Approved Welding C	onsumables					May-28-2013
	199	Fire-Fighting System	s for On-Dec	k Cargo Areas of Co	ntainer Carriers		2013	Apr-18-2013





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