

COILDED TUBING

PRODUCT LINE REPORT



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COILED TUBING INTERVENTION SERVICES SUPPLIER PERFORMANCE REPORT

Overview

The 2017 Coiled Tubing Intervention Services Supplier Performance Report presents the results of in-depth, personal interviews with decision makers with oil & gas operators worldwide who purchase and use coiled tubing intervention services. The report assesses market share, supplier performance, supplier competitive positioning and buying preferences among the oil & gas operators worldwide.

The report is based on person-to-person phone interviews with 135 respondents worldwide conducted from January to March, 2017.

Each respondent interviewed was pre-qualified for the product category evaluated and the interviews lasted approximately 30 to 45 minutes on average. Completion, production and drilling managers and engineers and other subject matter experts were interviewed for their respective area of responsibility.

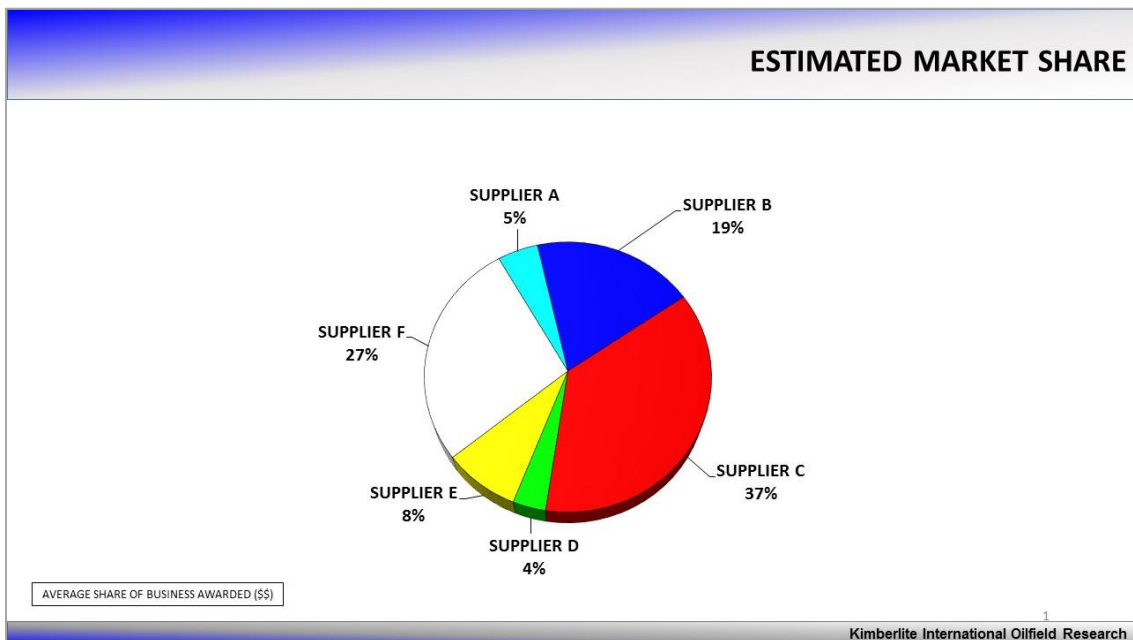
Performance ratings for over 47 oilfield service companies were evaluated in the report including both the major suppliers (Schlumberger, Halliburton and Baker Hughes) and smaller, independent and regionally based suppliers.

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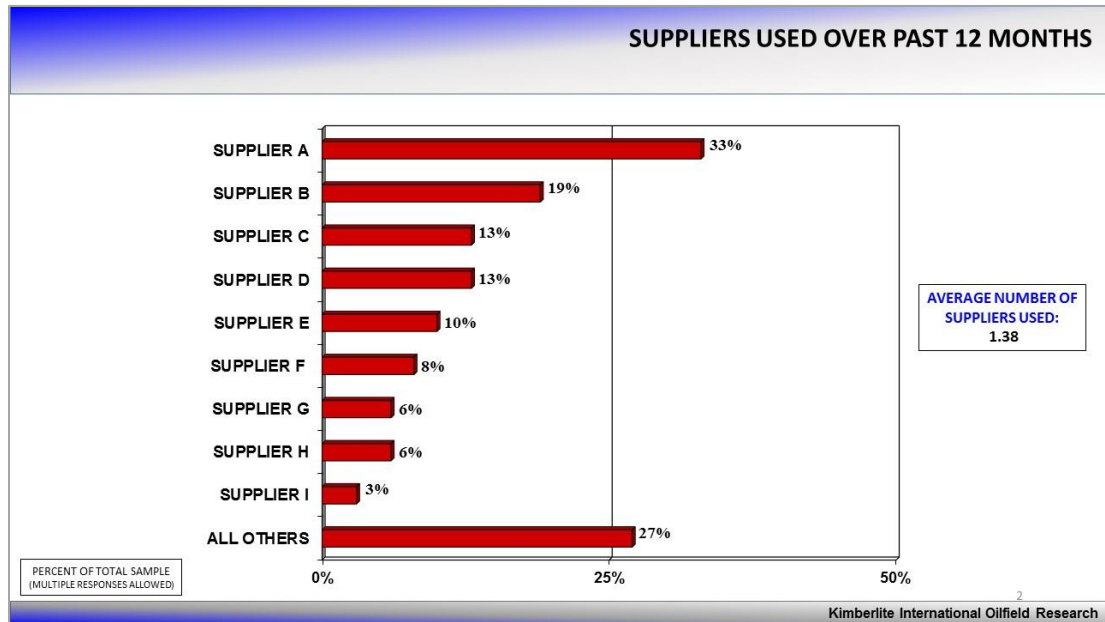
Example Exhibits

A. Supplier Market Share Data – Estimated share of business awarded



ESTIMATED MARKET SHARES BY SELECTED REGIONS								
Suppliers	Worldwide		NAM Land		International Land		Total Offshore	
	% Using	Est Market %	% Using	Est Market %	% Using	Est Market %	% Using	Est Market %
Supplier A	57.70%	42.48%	37.00%	17.47%	62.50%	49.87%	65.40%	43.56%
Supplier B	33.30%	25.43%	29.60%	20.97%	28.10%	17.52%	38.50%	27.11%
Supplier C	38.70%	24.92%	33.30%	12.74%	37.50%	18.37%	42.30%	27.08%
Supplier D	11.70%	3.71%	29.60%	20.97%	9.40%	9.39%	3.80%	1.23%
Supplier E	4.50%	1.30%	14.80%	6.61%	-	-	1.90%	1.02%
Supplier F	0.90%	0.16%	3.70%	5.38%	-	-	-	-
Supplier G	0.90%	0.39%	3.70%	5.38%	-	-	-	-
Supplier H	0.90%	0.16%	3.70%	2.15%	-	-	-	-
Supplier I	0.90%	0.16%	3.70%	2.15%	-	-	-	-
Supplier J	0.90%	0.16%	3.70%	2.15%	-	-	-	-
Supplier K	0.90%	0.12%	3.70%	1.61%	-	-	-	-

B. Supplier Market Penetration – Suppliers used over past year worldwide and by selected regions



C. Supplier Net Promoter Scores

The Net Promoter Score (NPS) is a widely used industry benchmark and is based on the question “How likely would you be to recommend this company (or product) to a friend or colleague” using a scale of 0 to 10 with 10 being highly likely. NPS is a good benchmark to track and monitor customer loyalty.

The report presents supplier Net Promoter Scores versus Industry Average by:

- Region and Company Type

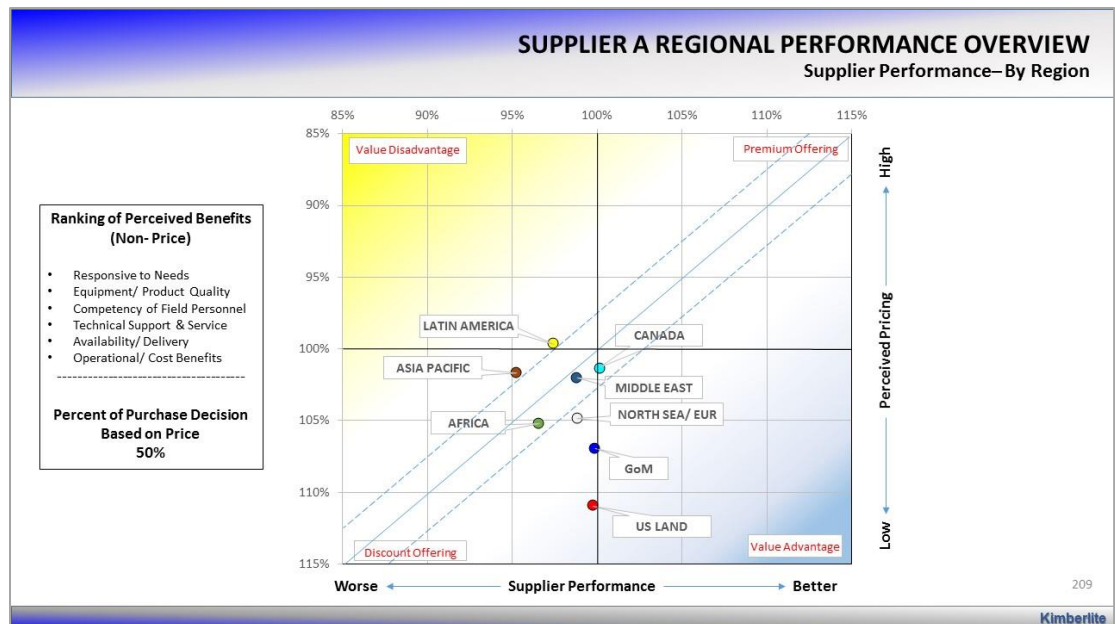
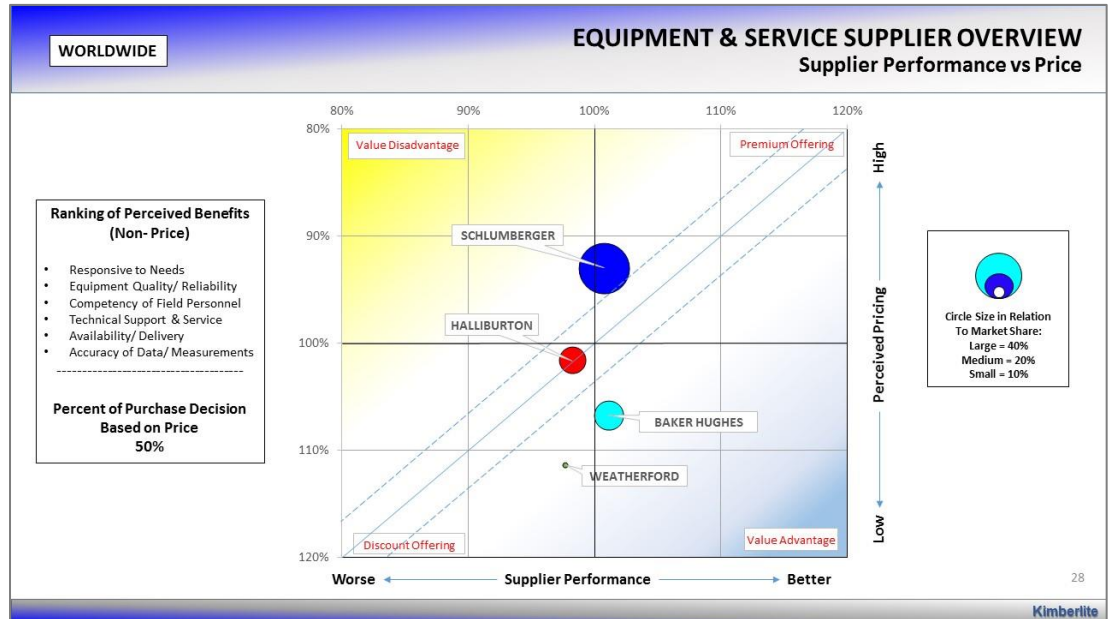
NET PROMOTER SCORES - COILED TUBING INTERVENTION SERVICES					
	Category Average	Supplier A	Supplier B	Supplier C	Supplier D
Worldwide	17.8%	Yellow	Yellow	Yellow	Yellow
US Land	14.9%	Green	Green	Green	Red
International Land	20.1%	Green	Red	Red	Red
Worldwide Offshore	28.5%	Red	Red	Red	Green
BY COMPANY TYPE					
Majors	20.3%	Red	Red	Yellow	Yellow
Large Independents	12.1%	Green	Green	Green	Red
Med/ Small Independents	22.7%	Red	Red	Red	Yellow
National Oil Companies	22.1%	Red	Green	Green	Red
ABOVE INDUSTRY AVERAGE PERFORMANCE		INDUSTRY AVERAGE PERFORMANCE		BELOW INDUSTRY AVERAGE PERFORMANCE	

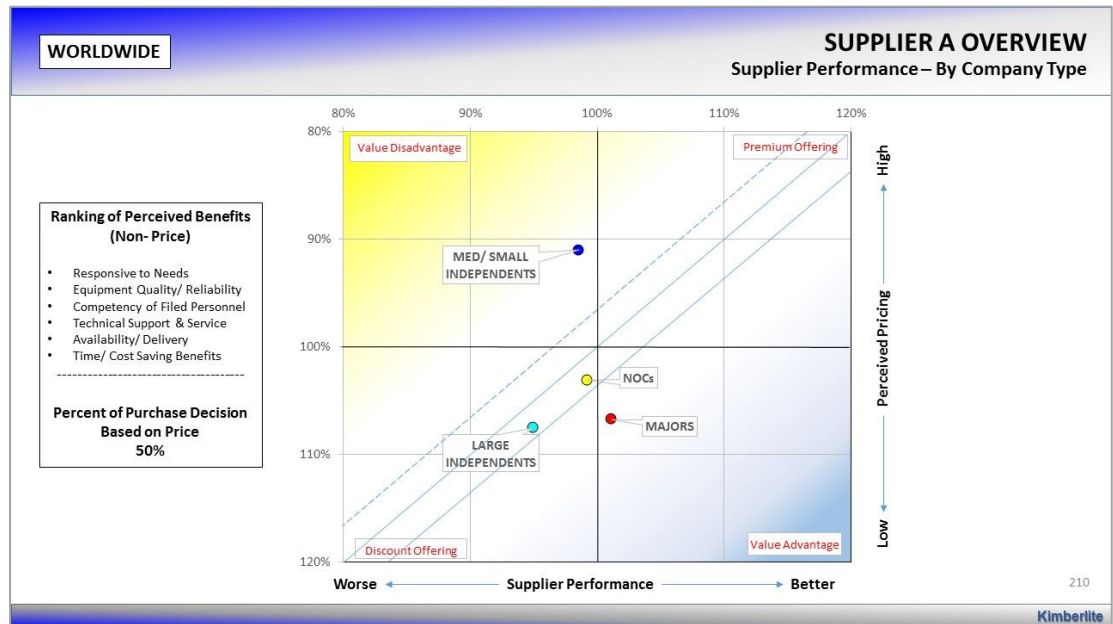
D. Supplier Value Map – Competitive Positioning of Major Suppliers

Evaluating each supplier's overall performance relative to the respective cost for the supplier services is important to track and measure. This analysis is reflected in the Value Map which is a visual picture of the relative competitive positioning of each supplier. Supplier performance is plotted on the X-axis and supplier pricing is plotted on the Y-axis. The "fair value line" is shown diagonally across the Value Map and its slope reflects the relative weights customers place on costs and benefits.

Supplier Value Map – Individual Suppliers Competitive Positioning by:

- Worldwide – Region – Company Type





E. Supplier Head-to-Head Analysis – Strengths & Weaknesses on Key Performance Criteria

