

# Decom Live Amsterdam

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June 2022

Sam Long, Chief Executive



## Agenda

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DNS – an introduction

NexStep

Market update

Future trends



# Introduction – Sam Long, Interim CEO



Callum Falconer  
Ops Director

# Decom North Sea (DNS) | Introduction

Not For Profit trade body for **Late Life** and **Decommissioning** (LL&D) in **energy sector**

Subject Matter Experts

**Membership led** and **event** focussed

Addressing post COVID19 and ramifications of the **Energy Transition**

Renewed focus on **international** opportunities - hence Decom Live Amsterdam

Always open to **new members**





# Vision

Global knowledge network, thought leaders and representatives for international decommissioning and late life services, in the energy sector



# Mission

**Networking** and **events** for late life and decommissioning in the **energy sector**

Advocates of **safe, low carbon** and **efficient** late life and decommissioning, utilising advanced technology and services

Enabling **skills transfer** and **development** to meet future needs of the Energy Transition

An **independent, professional** and **sustainable**, membership organisation

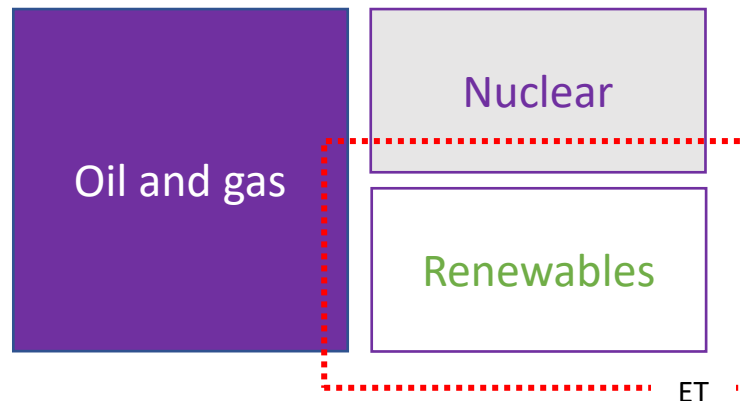
# What's happening counts...

**Market intelligence** of current and future work scopes in LL&D

## Events and networking

- Decom Live, Learning Journey, Members Sports Day, Decom Conference, Pop up Decom
- In person and online

**Marketing** and promotion, **strategy** and **advice**



Decom Live  
Aberdeen 2021

# NexStep | Netherlands

Jacqueline Vaessen, GM, NexStep

National leads for re-use and decommissioning

**NEW Reuse and Decommissioning Report**, due 06 July 2022

**Joint Well Campaign** initiated April 2022

- NAM, Neptune Energy, ONE-Dyas, Petrogas E&P, TotalEnergies EP Nederland and Wintershall Noordzee
- Main contractor: Oceaneering Services B.V.
- Sub contractor: Bluestream Offshore B.V.

# Market | Global

**Europe** continues to dominate

Positive **CAGR** 16.5%

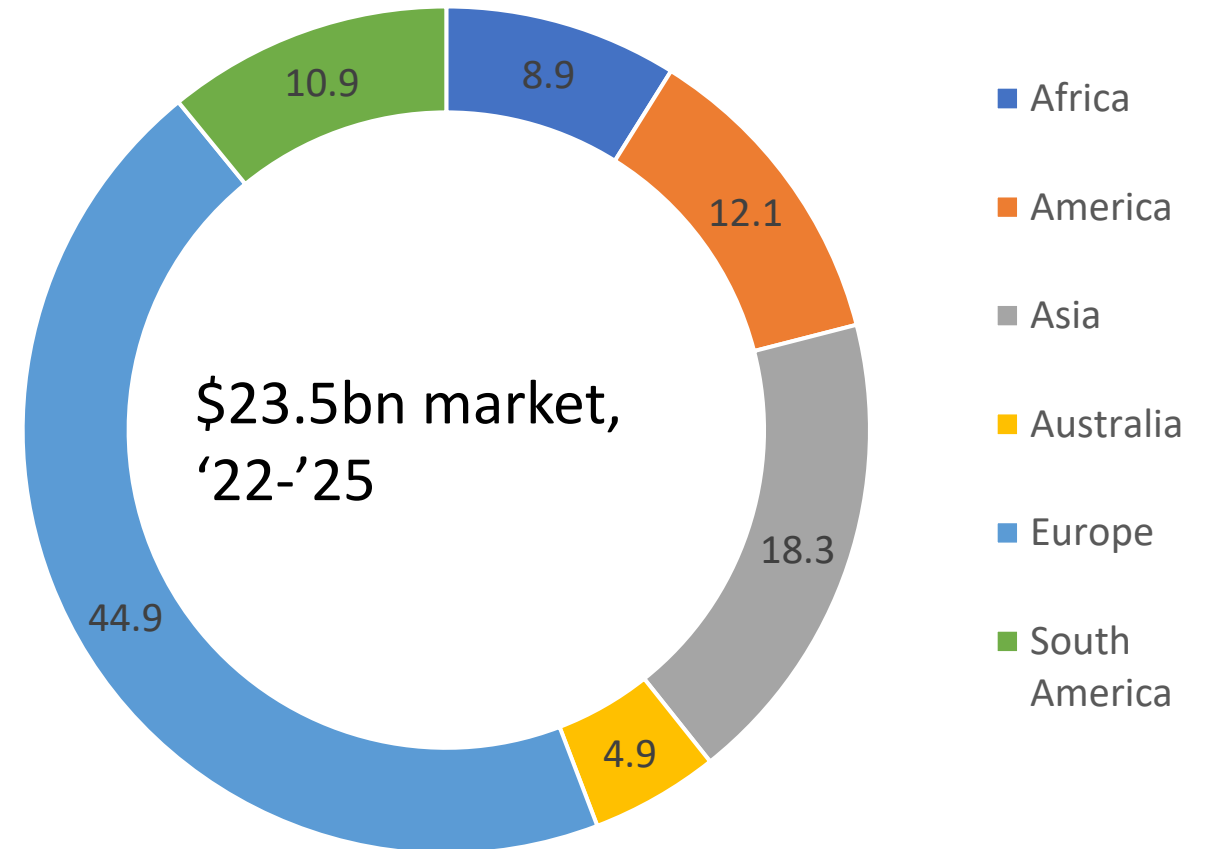
Growth in **'24/'25**

Absence of Middle East

Time based **backlog**

Impact of **energy trilemma** unknown

- Affordability
- Security of supply
- Sustainability



Source: Rystad

# Market | Europe as a precursor

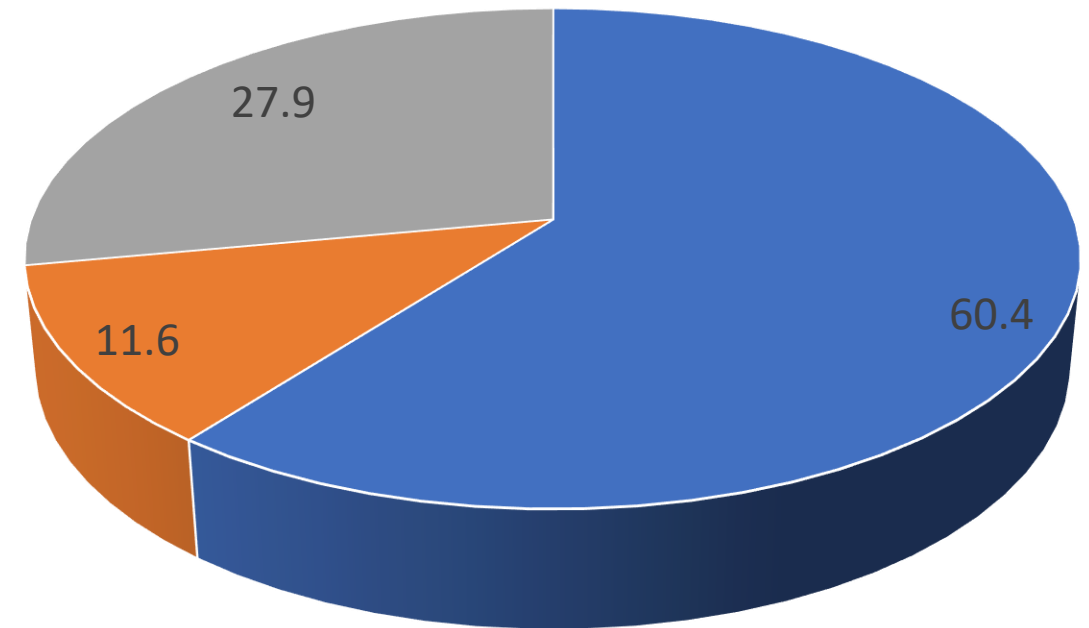
European market value: \$10bn

- UK
- Norway
- Denmark
- Netherlands

Estimate vs actual

- Strong datasets emerging
- 50% of decom cost is **wells**

Split by activity type, '22-'25



■ Fixed ■ Floater ■ Subsea

Source: Rystad

# Market | Other

## SE Asia

- Increasing **confidence**
- Similar but not identical **service needs** to Europe
- Conflicting pressures to invest in decarbonisation and meet rising regional energy demand

## GoM

- Mature and **proven region** for P&A and decom
- Well known for a **different approach** from NS, but much crossover
- Contract awards to Petrofac and Promethean indicate forward trend
- Increasing recognition of need to protect environment

## South America

- Dominated by **Brazil** - P'bras have engaged SC in last 12 months
- Need for more expertise and appropriate investment

# Future trends

## People

- Invest to recruit and retain professionals. Transferable skills. Professionalism

## Diversification

- LI&D in O&G, nuclear and renewable assets
- Create international capability - maximise opportunities

## Health, Environment and Safety

- Advocate safe and sustainable best practice in LL&D. Reduce impact, reduce cost. Do the right thing

## Sustainability

- Financial and sectoral sustainability of DNS, foster for the future
- Address issues around waste management (O&G, nuclear, CO2)



# Q&A



Source: Scaldis



**DECOS**  
North Sea

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**Thank You**

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