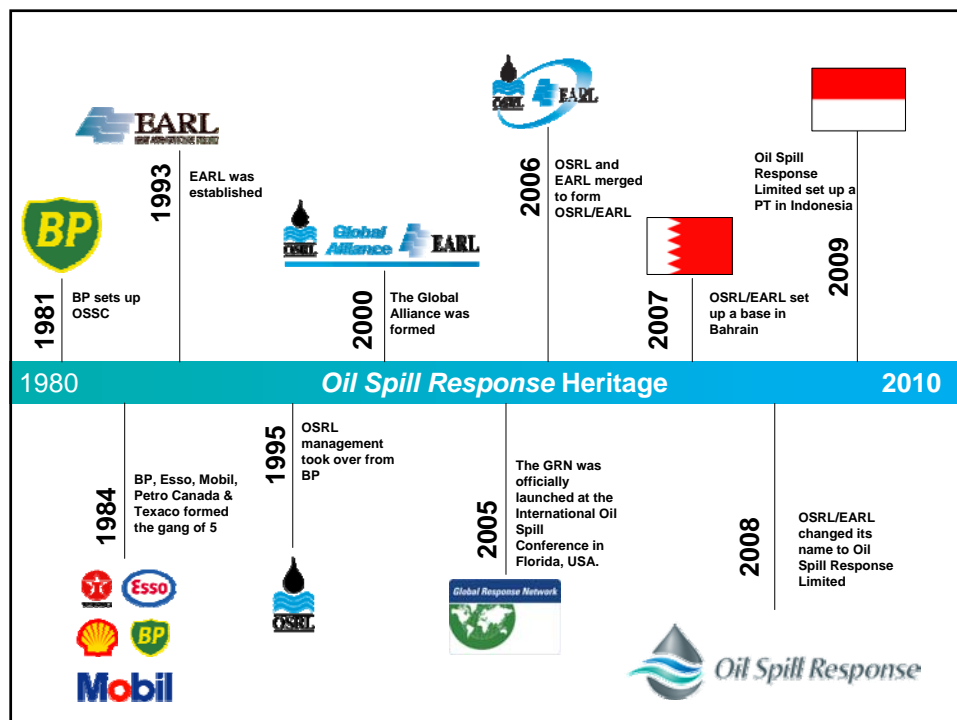




“25 Years of Oil Spill Response”

The Growth of the Organisation its Alliances and Challenges in the Modern Times.

Archie Smith,
March 2010



We are.....

a unique industry cooperative

Oil
Industry's
Tier 3 Spill
Response
Provider

Wholly
owned by
35 oil and
energy
companies

The only oil
spill
response
co-
operative
with a
global remit

Industry
Funded
by approx
60% world
production

An
accredited
centre for
oil spill
training

Our Mission

is to provide resources to respond to oil spills
efficiently and effectively on a global basis



What We Do



RESPONSE

PREPAREDNESS



Training



Consultancy



Equipment Leasing



Our Members

Participant Members

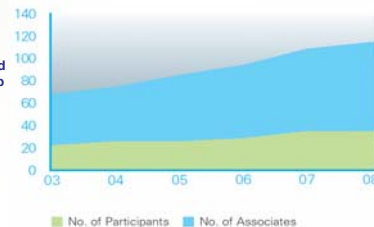


Associate Members

Afren Energy plc
Antrim Energy
Atash company LLP
BAPCo
Bailiwick of Guernsey
Botas International Limited
Bow Valley Petroleum
Bridge Resources
Cairn Energy India
Centrica Storage
Century Exploration
Chrysaor Ltd
Dana Petroleum
Dragon Oil
Endeavour Energy
Energy Resources Technology
Engen Petroleum
Eon-Ruhgas
EurOil
Fairfield Energy Ltd
GDF Suez
Government of Gibraltar
Great Lakes & Dredging
Granby Tristan Limited
Guam Response Services Ltd
Gujarat State Petroleum Corp
Hardy E&P India Inc
Harwich Haven Authority
HM Naval Portsmouth
Husky Oil China Ltd
Iranian Oil (UK)
Irish Coast Guard
Ithaca
Japex Libya
Kosmos Energy LLC

Lundin Services
Maersk Oil North Sea
Nautical Petroleum
Nido Petroleum Philippines
Nippon
Noble Energy
Oil Ex Co
OMV
OPET
Ophir Services
PA Resources
Petrofac Development
PC Vietnam Ltd
Petronas Carigali Mauritania
PowerSeraya Ltd
Premier Oil
Providence Resources
PT Arah Prana
PT Kawasan Industri Dumai

PXP
Reliance Industries Ltd
Repsol Exploration SA
RWE Dea UK
Salamander
Santos Ltd
Sasol Petroleum
Serica Energy plc
Silverstone Energy
Singapore Petroleum Company
Spanish Coast Guard
Stratic Energy
Sterling Resources
TAQA
Tullow Group Services
Tupras
Valiant Petroleum
Venture
Vermillion
Wintershall AG



The Changing World

The Changing World

- 💧 Increased environmental awareness
- 💧 Real time communications
- 💧 Increased legislation
- 💧 Reduced oil spill incidents

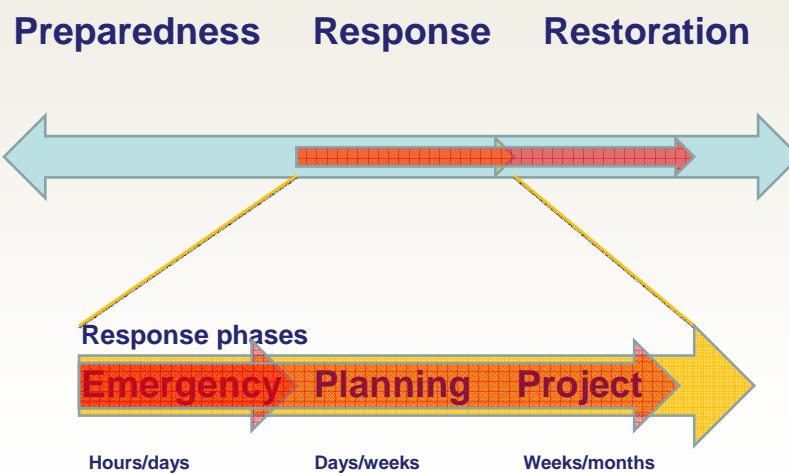
Impacts on the oil industry;

- Higher cost of spills
- Need to avoid liabilities
- Outsourcing non core services
- Reduced knowledge base

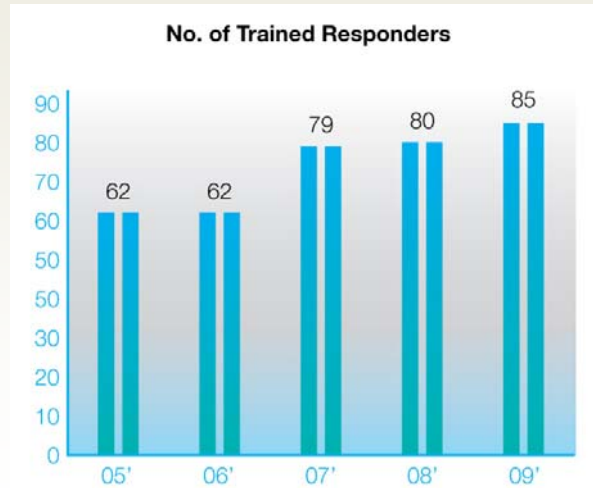
The Impact of the Changes

Changing World		
	FROM	>> TO
MARKET CHANGE	Corporate-led	>> Business Unit-driven
	Centralised	>> Global multi-location
	In-house expertise	>> Customer integration
	Government-driven	>> Oil company onus
OSRL/EARL DEVELOPMENT	Centrally located	>> Regionally focused
	Response orientation	>> Preparedness / Response / Technical Advice and Management Services
	Task-driven	>> Broader / varied service role
	Equipment focus	>> People / expertise / networks
	Short projects	>> Long-term / advisory / external focus

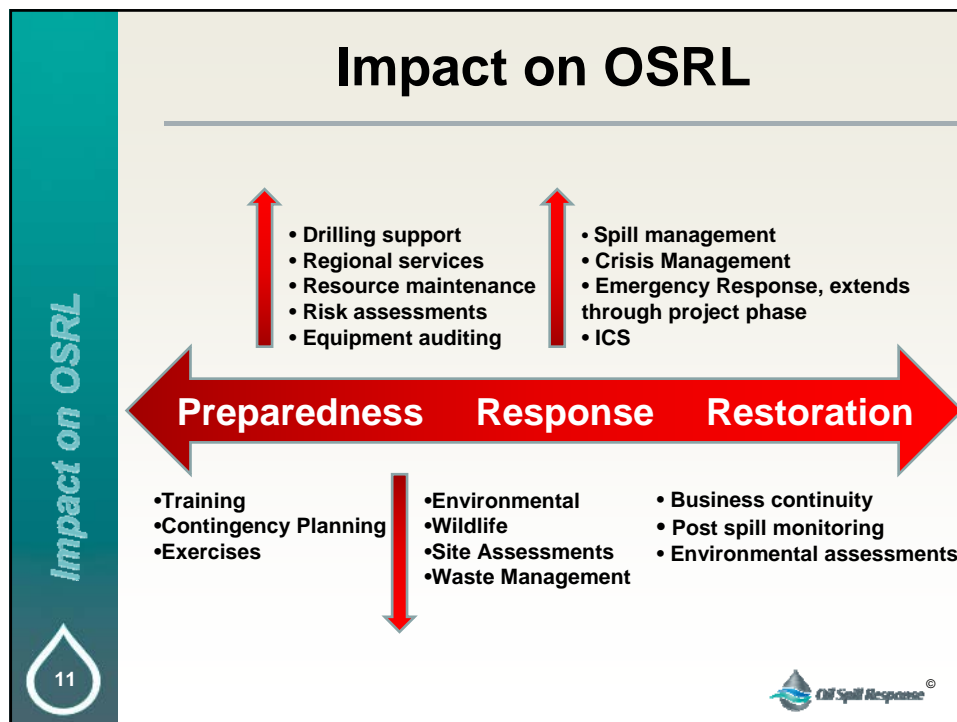
Changing Expectations



Increasing workforce



Global Response Network



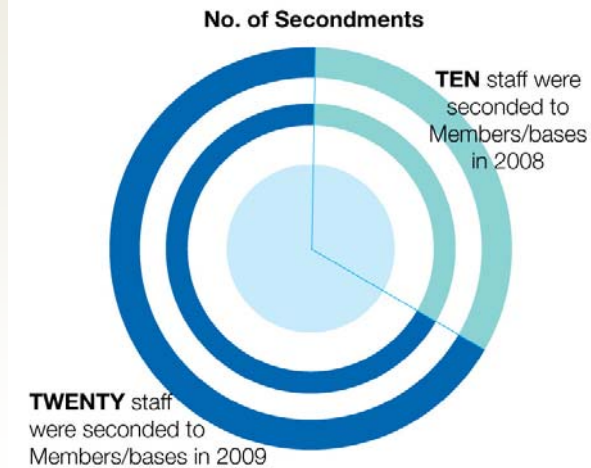
Improving Response Resources

Impact on OSRL

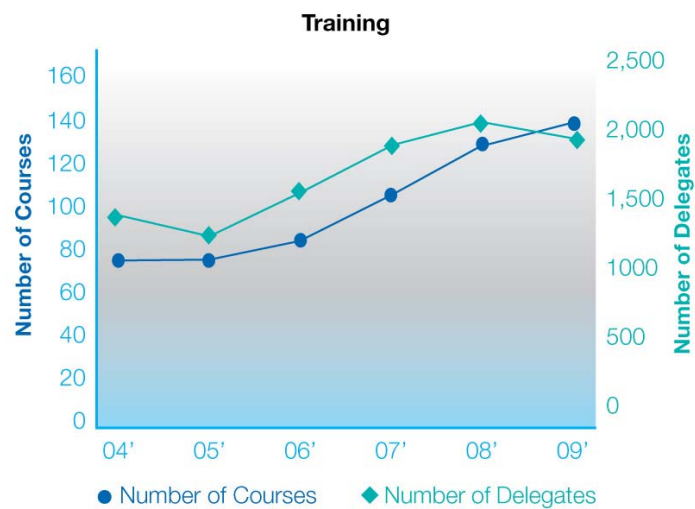
People

- Increased diversity;
 - Male & female
 - Education
 - Nationality
- Highly experienced staff
- Competency-based development
- Diverse workforce and range of disciplines
- Personnel to fill roles in ICM structure for operations, planning and logistics

How our people have changed



Increased Demand for Services

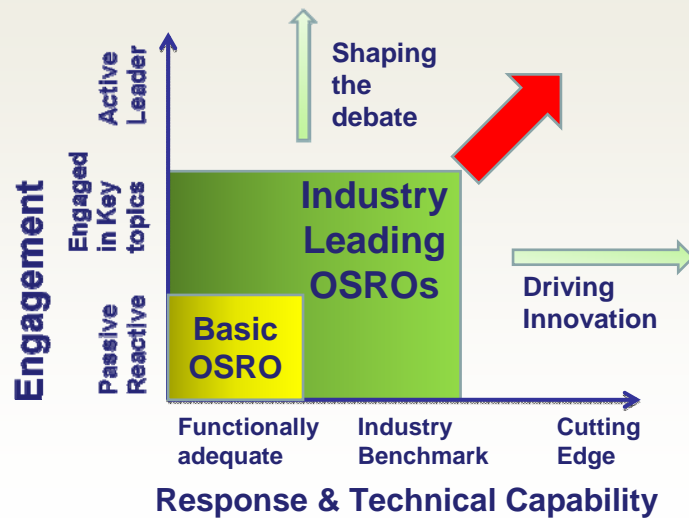




Implications for OSROs

- Need to maintain high standards of operational readiness and an ability to deploy and integrate in a response with the right people and the right equipment.
- However with the changing times must be prepared to accept the shift of expertise from industry to the OSROs and then demonstrate the necessary critical competencies.

Continuous development



Conclusion

- Continuous change but a continuing demand for highest level of response readiness.
- Expectation from industry that we will increase our range and level of services and proactively add value
- We should expect to play a leadership role which demands higher levels of expertise, and do so with the same level of efficiencies industry achieves.