



> Organização Nacional da Indústria do Petróleo



IGU Committee Meeting (WOC1 and PGC A) The National Organization of the Petroleum Industry (ONIP)

Workshop on Natural Gas and Sustainability R&D, CENPES

February 20th, 2013





**TO CONTRIBUTE TO THE INCREASE OF THE
COMPETITIVENESS AND SUSTAINABILITY OF THE
NATIONAL INDUSTRY, TO MAXIMIZE THE LOCAL
CONTENT, EMPLOYMENT GENERATION AND INCOME IN
THE OIL AND GAS SECTOR.**

ONIP Associates/Members

INDÚSTRIA



SISTEMA NACIONAL DA INDÚSTRIA



GOVERNO FEDERAL

OPERADORES

GOVERNO ESTADUAL

ONIP Activities (1)



LOCAL CONTENT MANGEMENT SYSTEM

- Local Content Measurement of Projects



- Plataforms (P51; P52; P53; P54; P-55; P56; P-57; P-59; P-60; P-58; P-62;P-61; P-63; P66-73cascos; PRA1; PMXL1)
- Refining / Terminals: Caraguatatuba, Cacimbas, UTGSulRecap, Replan, Repar, Rpbc, Regap, Reduc, Revap, Rlam e Renest
- Local Content Management System -

KNOWLEDGMENT

- Competitiveness Agenda
- REPETRO taxation system

INSTITUTIONAL

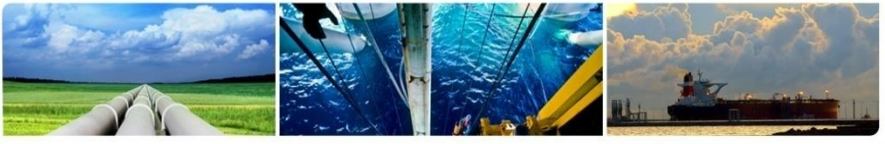
- Regional Offices
- Breakfast with Energy
- PROMINP
- Regulatory Framework
 - Interface with ANP
- Associates Support
- CB-50 / ABNT – Executive Secretariat
Brazilian Standards (ISO TC67)

ONIP Activities (2)



SUPPLY CHAIN DEVELOPMENT PROGRAM

- Suppliers Registration and Qualification
 - ONIP Supplier Registry System
 - CadFor
 - Navipeças Registry System
- Business Rounds
- Specific Seminars
- Thematic Road Maps
 - Innovation
 - Mature Technologies
 - Technology Transfer
- R&D&I
 - Platec – Technological Platforms
 - Navipeças
 - FPSO
 - Drilling Rigs
 - Onshore
 - Prototype Labs
- International Competitiveness Increase
 - Prointer O&G (Sebrae)

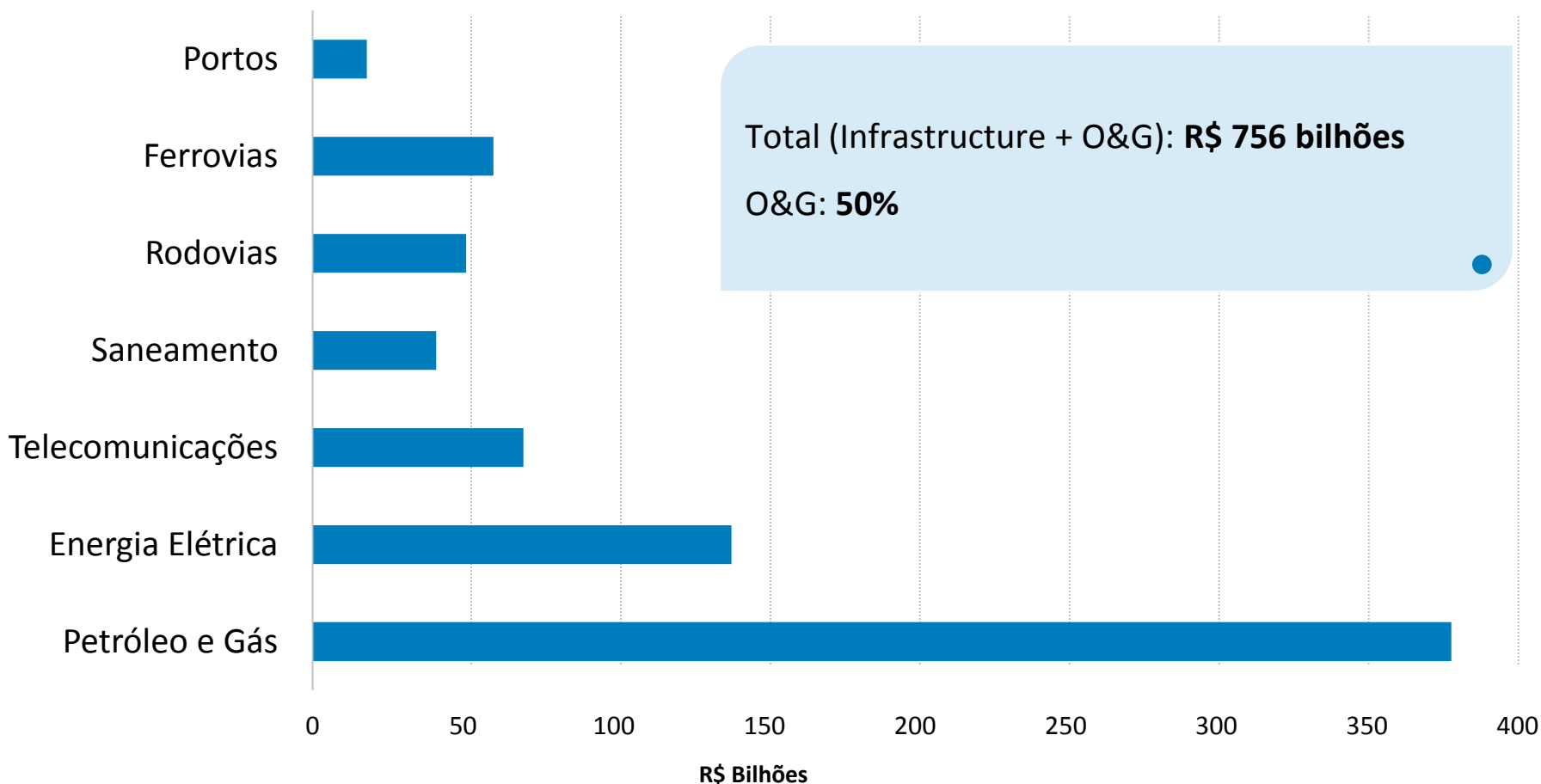


1.

O&G Investments Scenarios

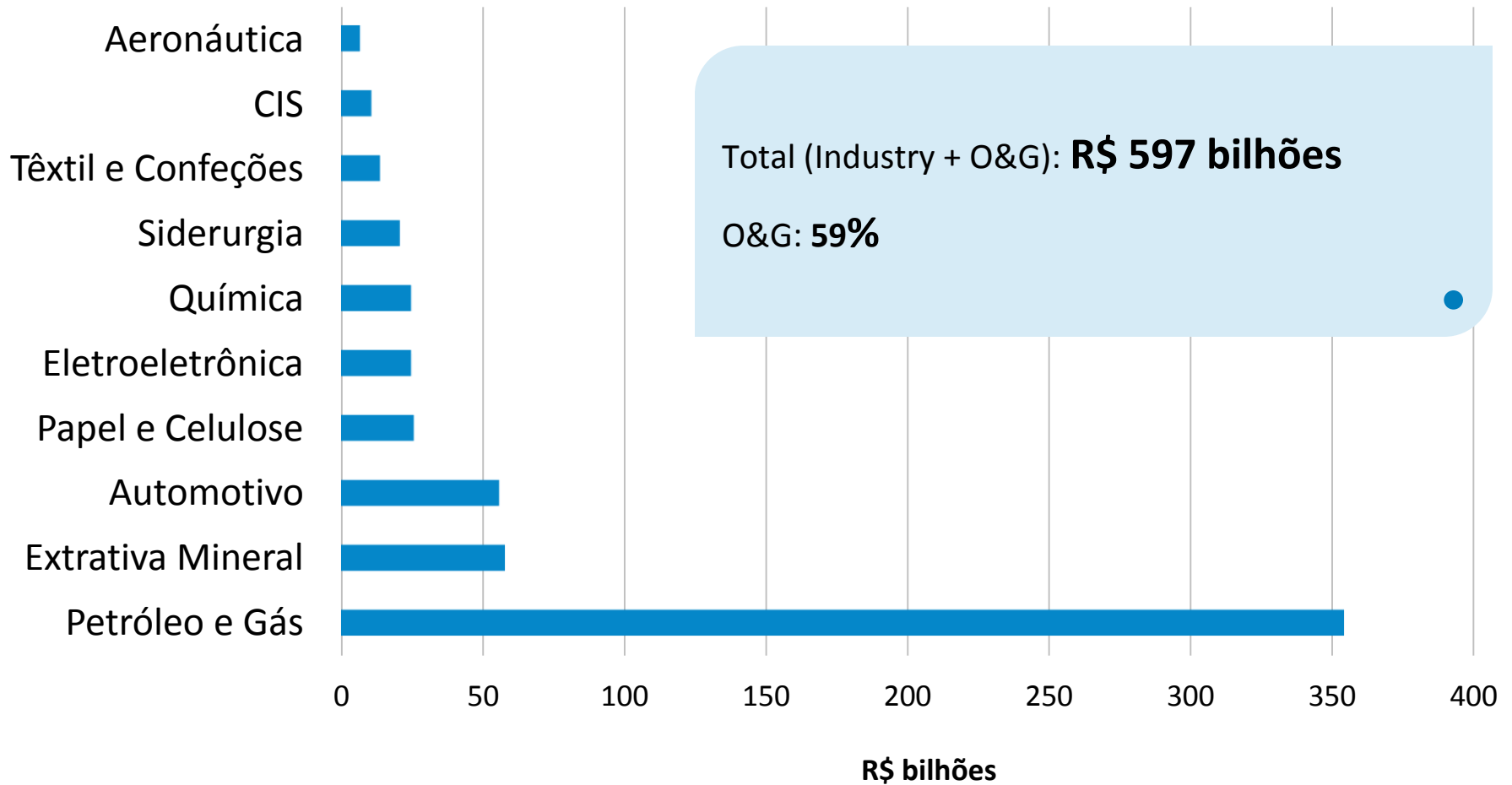
Investments - Infrastructure and O&G

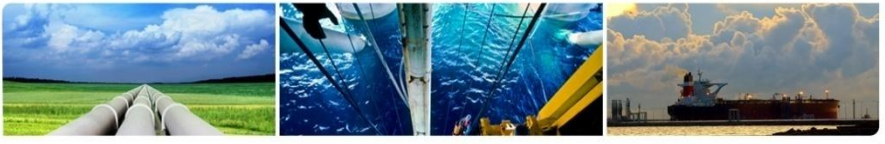
2011-2014



Investments – Industry Sectors

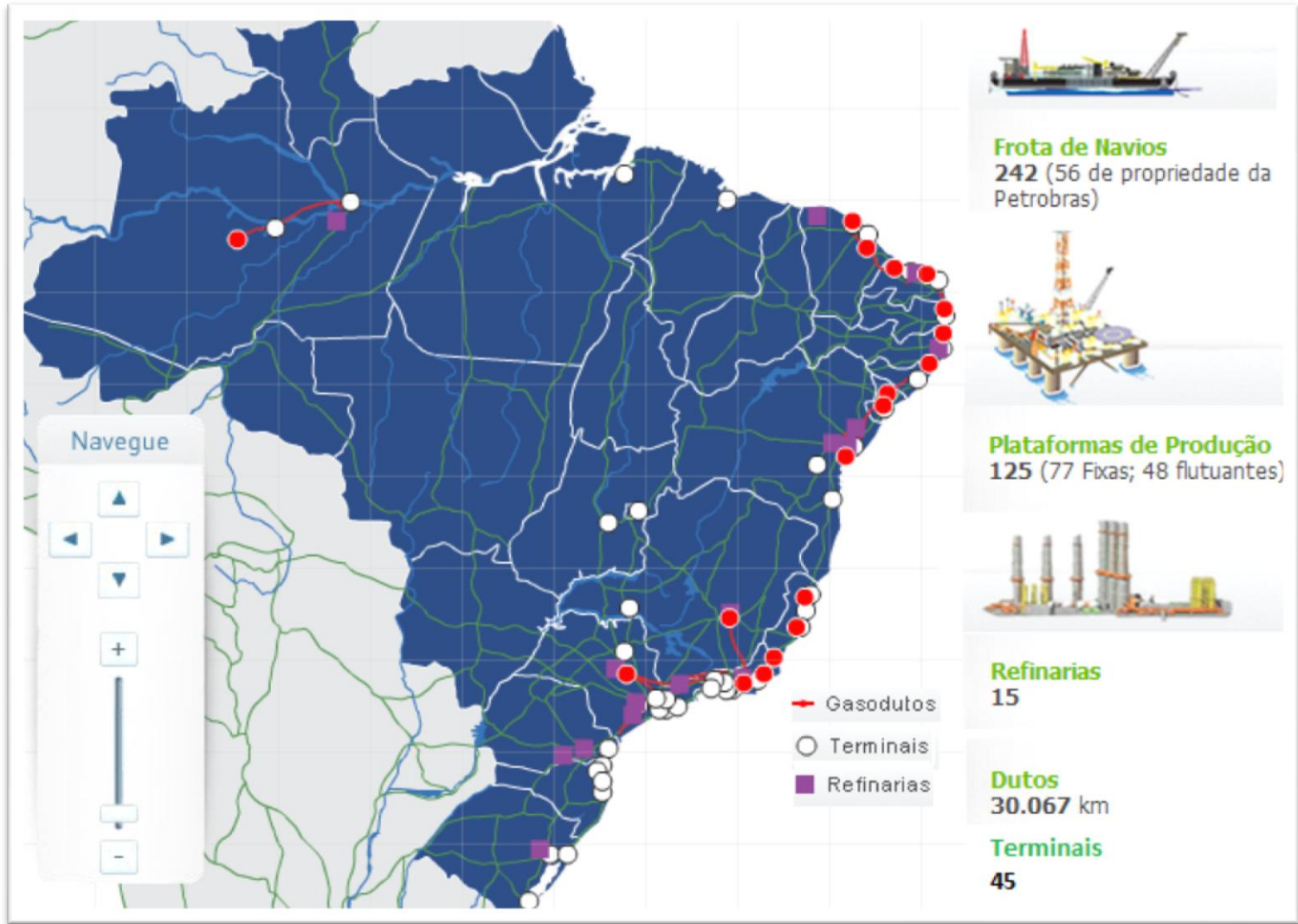
2012-2015



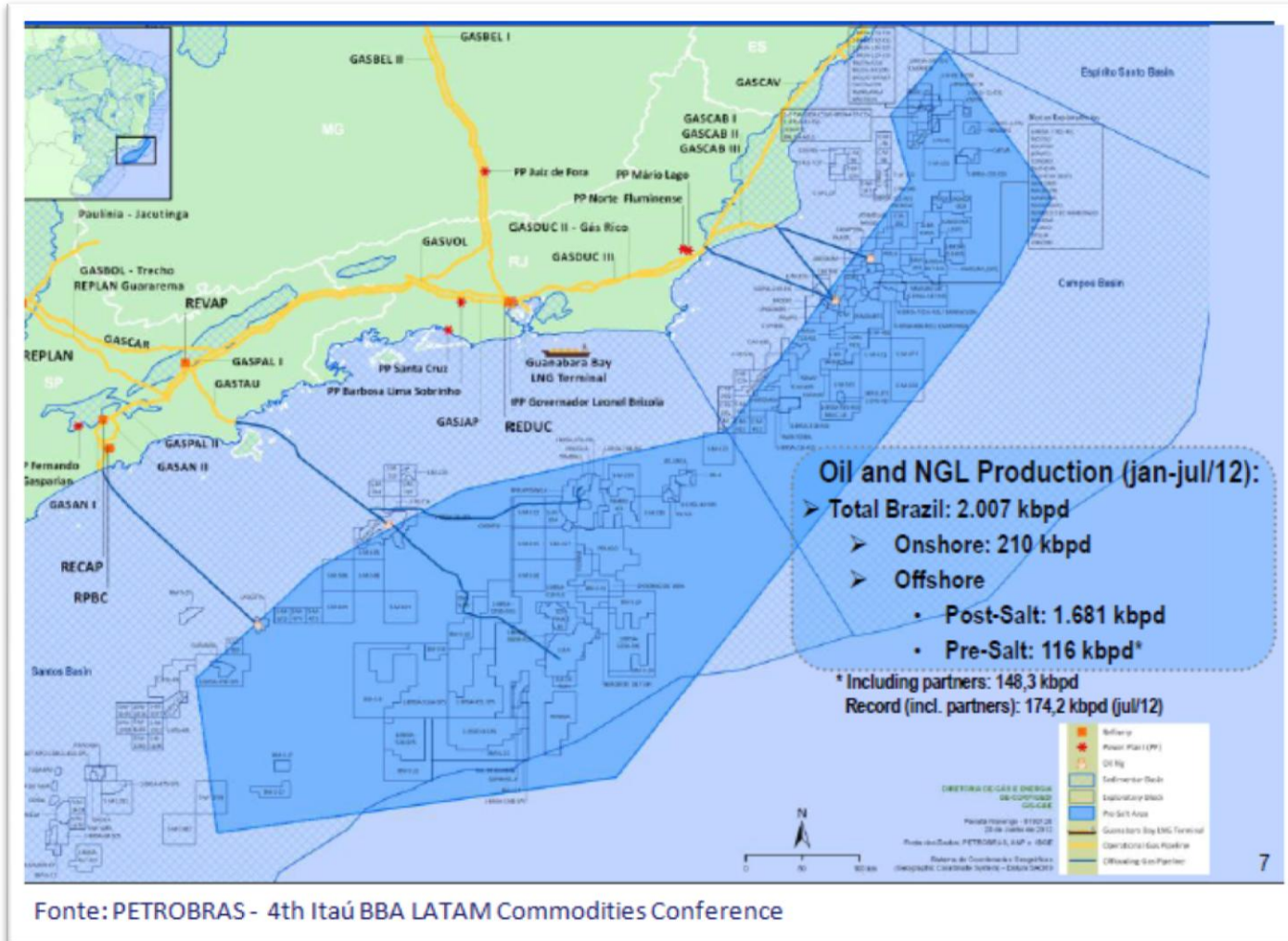


2. Operational Legacy

Investments keep industrial units in the country that constantly use a supply chain for decades ...



There will be no difference in developing the pre-salt and other exploratory frontiers ...



Demand for goods and services in the Offshore sector will be around \$ 400 billion by 2020

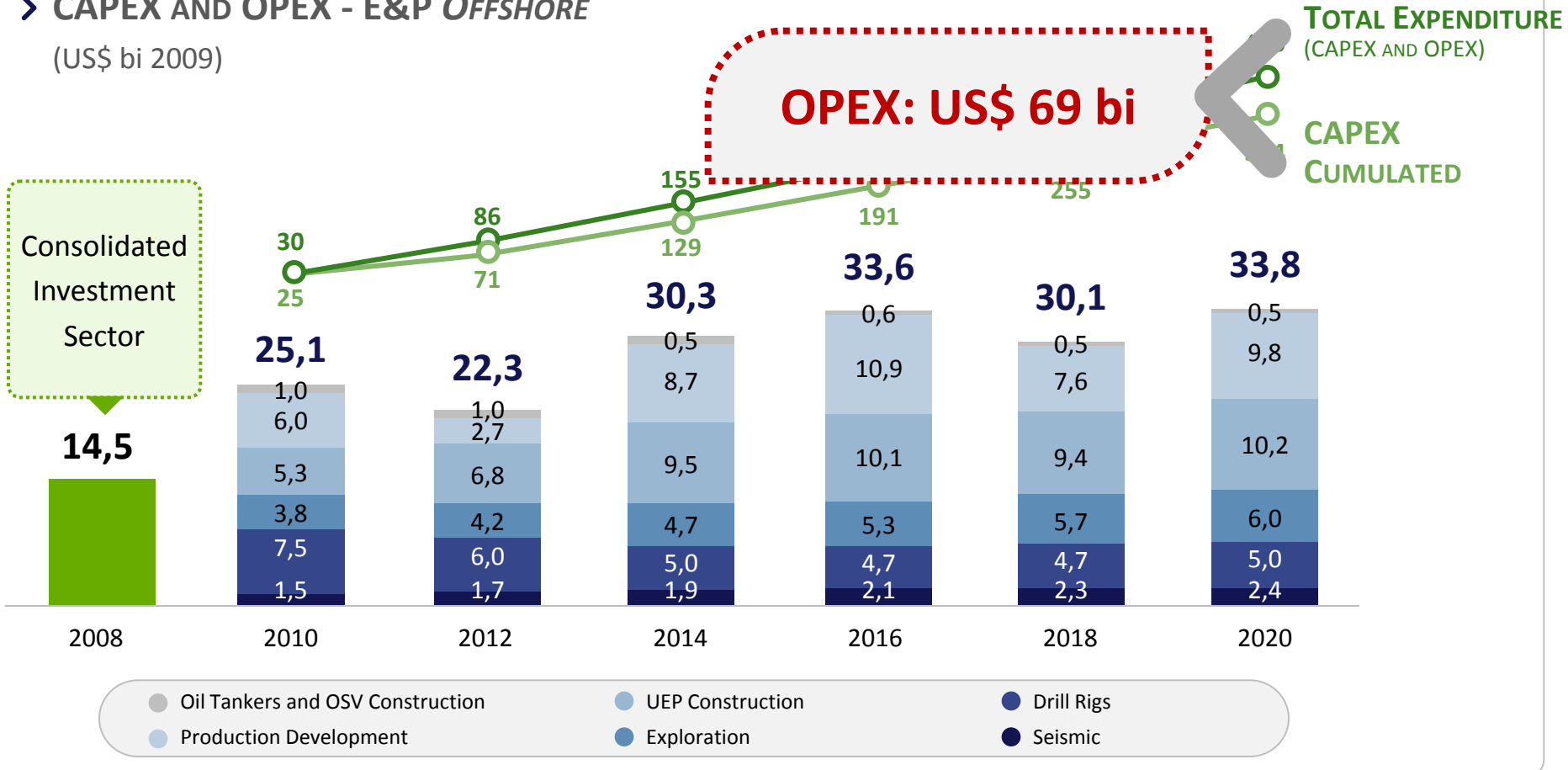


Sufficient scale to develop robust supply chain of goods and services locally

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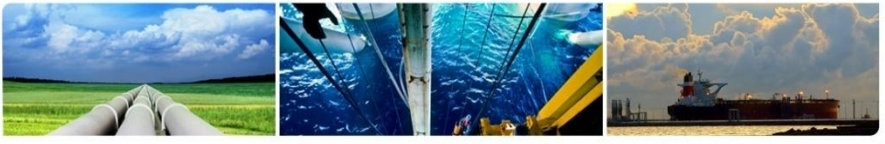
> CAPEX AND OPEX - E&P OFFSHORE

(US\$ bi 2009)



Nota: Includes rigs and production units already leased

Fonte: Agenda da Competitividade. ONIP (2010).



3.

ONIP x Scenario

Opportunities

Goods and Services



- The pre-salt exploration increased the demand for FPSO platforms;
- The FPSOs match most platforms used in the Pre-Salt;
- ONIP studies have identified possible 1000 parts and equipments to be fabricated in Brazil only in FPSOs;
- MultiFor Program available since June/2012.



CONSTRUCTION OF CONCRETE PROJECTS X SUPPLY CHAIN
BOTTLENECK



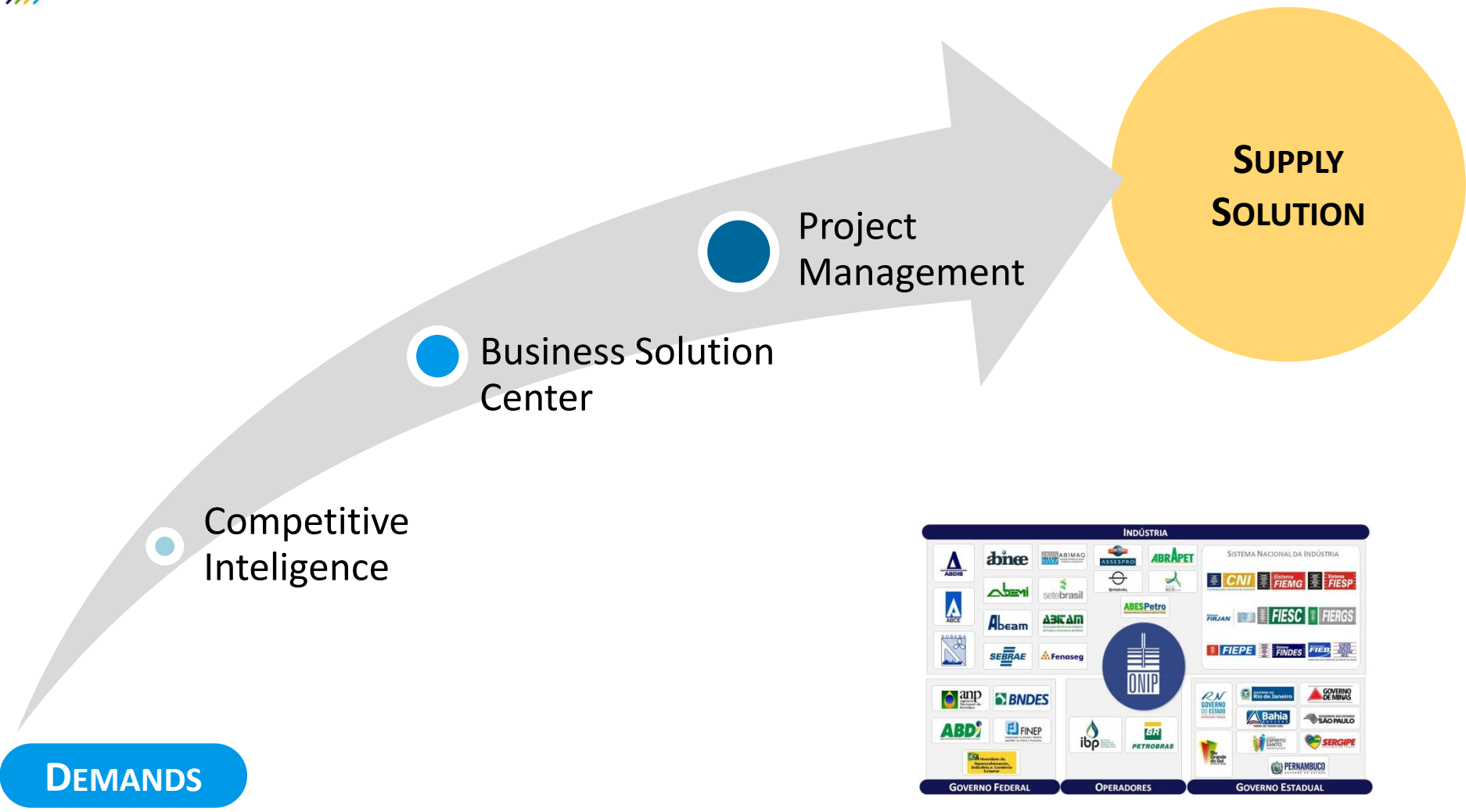
INCREASE THE LOCAL CONTENT



INTENSIFICATION ENHANCEMENT OF VALUE CAPTURE

ONIP MULTIFOR

Supply Chain Development



ONIP Activities



LOCAL CONTENT MANAGEMENT SYSTEM (2011 -2012)

- **MORE THAN 5000 ITEMS**

KNOWLEDGMENT

- Competitiveness Agenda :
<http://novosite.onip.org.br/wp-content/uploads/2011/07/English-version-final.pdf>

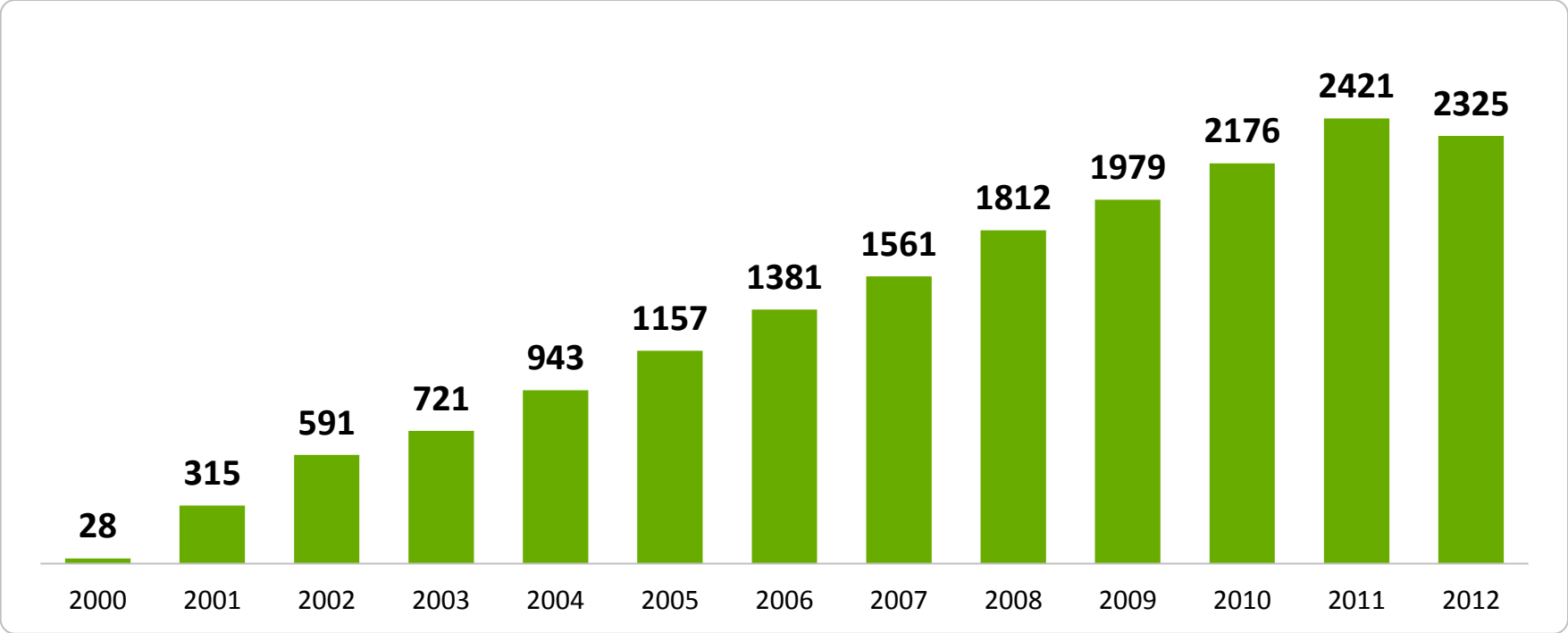
INSTITUTIONAL

- Breakfast with Energy (1999-2012) : 24
- CB-50 / ABNT – Executive Secretariat
Brazilian Standards (ISO TC67) :
- 2011-2012 : 34 norms



SUPPLY CHAIN DEVELOPMENT PROGRAM

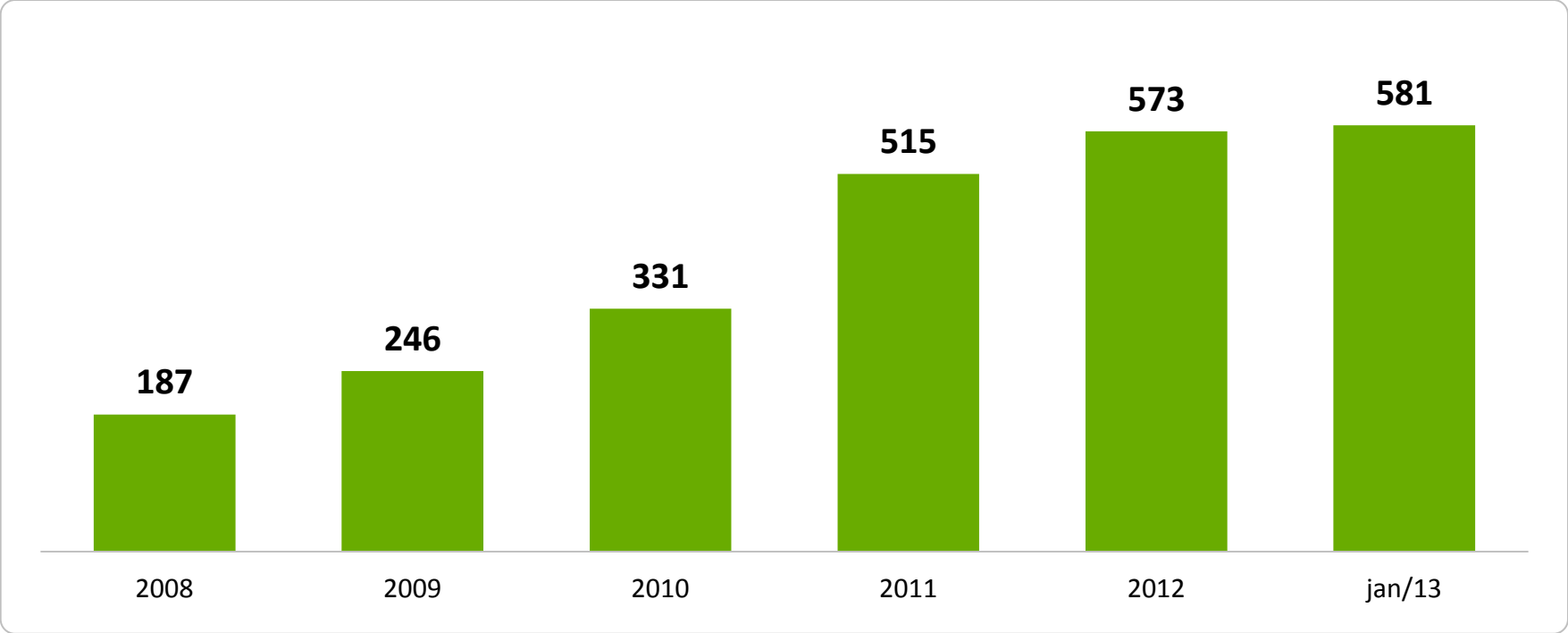
- Suppliers Registration and Qualification
 - ONIP Supplier Registry System





SUPPLY CHAIN DEVELOPMENT PROGRAM

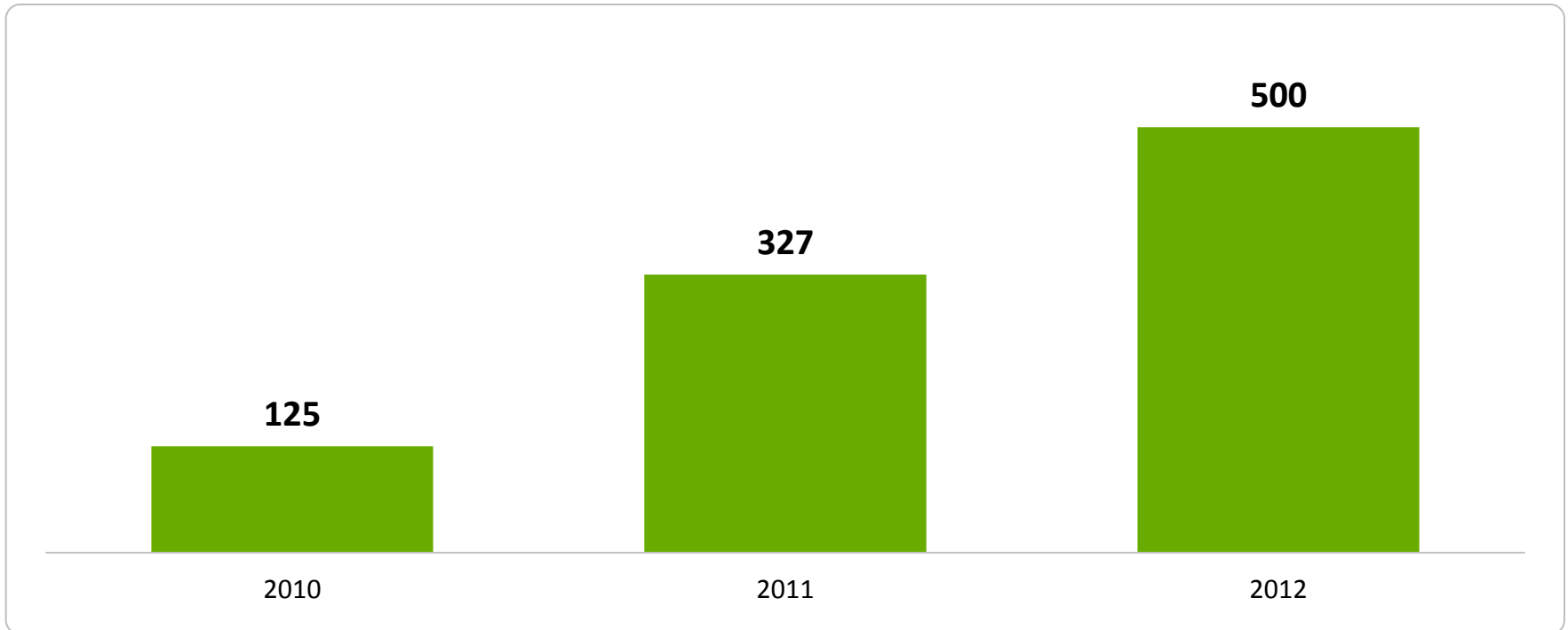
- Suppliers Registration and Qualification
 - CadFor





SUPPLY CHAIN DEVELOPMENT PROGRAM

- Suppliers Registration and Qualification
 - Navipeças Registry System



ONIP Activities (2)



SUPPLY CHAIN DEVELOPMENT PROGRAM

- Business Rounds

BUSINESS ROUNDS 2011-2012

Place/ Fair	Estimation of business in R\$:
Protection Offshore 2012	R\$ 87 million
Rio Oil & Gas 2012	R\$ 152 million
Navipeças Rio Grande do Sul	R\$ 62 million
Navipeças Bahia 2012	R\$ 61 million
Santos Offshore 2012	R\$ 86 million
Brasil Offshore	R\$ 170 million
Pernambuco Petroleum Business	R\$ 992 million
Vitória Oil and Gas	R\$323 million
Navipeças - Rio de Janeiro	R\$ 51 million

Total : 1.984 million



SUPPLY CHAIN DEVELOPMENT PROGRAM

- R&D&I
 - Platec – Technological Platforms
 - Prototype Labs
- International Competitiveness Increase
 - Printer O&G (Sebrae)

PLATEC - NAVAL EQUIPMENTS

Results



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- Identified Equipment: 1876
- Analyzed in 6 workshops: 622
- Identified Projects : 63
- Potential Projects : 48
- Participants: 381 companies





- WST 1 - Electronic Navigation Systems and Government - FIERGS
- WST 2 - Propulsion and Power Generation - FIESC
- WST 3 - Superstructure, Accommodations, Accessories Hull and Deck - FIEMG
- WST 4 - Pumps, Valves, Pipes, and Communication Equipment Anchoring and Mooring - ABIMAQ / SP
- WST 5 - Automation, Control, Utilities, Security and Salvage - REEF
- WST 6 - Safety of Navigation / Operations and Environment - FIRJAN
- WST 7 - Topside Instrumentation and Automation - CIESP - Campinas

PLATEC - NAVAL EQUIPMENTS



Results - examples

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1. LUBE OIL PURIFIERS

- Company Centrifugar - Rio de Janeiro
- Nor-Shipping 2011 fair(Norway)
- Edital FINEP - Pre-Salt
- Development Project with COPPE UFRJ and RBNA RJ



2. FUEL OIL PURIFIERS

- Company Centrifugar - Rio de Janeiro
- Nor-Shipping 2011 fair(Norway)
- Edital FINEP – Pre-Salt
- Development Project with COPPE UFRJ and RBNA RJ



Themes under progress

Goods and Services for:



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- **FPSO**
- **Offshore rigs**
- **Supply Boats and Ship Repair**



Themes under progress

Goods and Services for:



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- **Subsea infrastructure and maritime**
- **Onshore Exploration and Production**



Workshop Platec FPSO

Results



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- Theme: Topside Instrumentation and Automation
 - Analysed items: 78
 - Participants: 70
 - Identified Projects : 30
 - Magnetic flowmeters: ABB, SIEMENS, SMAR, RBNA, IPT
 - Software control setting type "PID":DEVICE, CONCERT, CHEMTECH, MECTRON, RBNA, IPT
 - Vibration Monitoring System: ALTUS, DEVICE, CONCERT, RBNA, IPT
 - Pontential Projects : 13



Workshop PLATEC -Supply Boats

Results



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- Theme: Topside Instrumentation and Automation
- Participants: 86
- Identified Projects : 19
 - Main gearbox - Main engine
 - Main Lube Oil Pump - Main engine
 - Rudder angle indicators and transmitters units
- Potential Projects : 17





SUPPLY CHAIN DEVELOPMENT PROGRAM - Prouter O&G (Sebrae)

Prouter 2011

- OTC / Houston / USA
- ONS / Norway
- Offshore Europe / Aberdeen / Scotland
- Europort / Rotterdam / Netherland

Prouter 2012

- OTC / Houston / USA
- Spain and Italy
- ONS / Stavanger / Norway



4. Conclusion

Conclusion



ONIP HAS BEEN CONTRIBUTING SIGNIFICANTLY FOR THE BRAZILIAN INDUSTRY REGARDING O&G VALUE CHAIN SINCE 1999. THIS CONTRIBUTION HAS BEEN SUPPORTED BY ROBUST RESULTS, EITHER STRATEGIC, OR PRACTICAL.



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