

# Customer

**John Knudsen, President - Commercial Marine**

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# Customer



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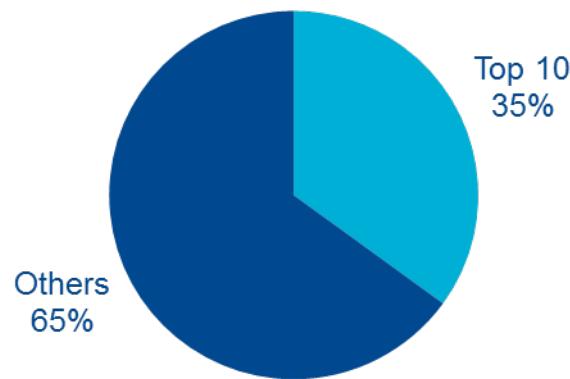
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# Large number of market players



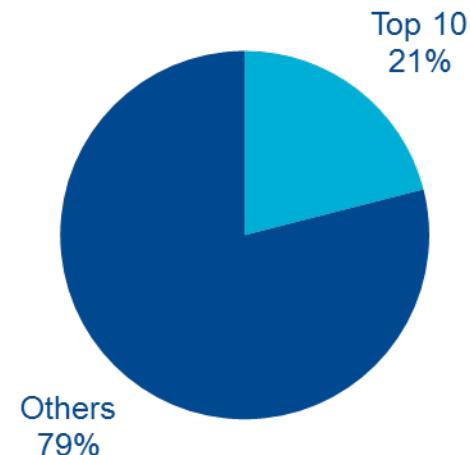
# Top 10 offshore companies

Shipyards - Offshore



Samsung Heavy Industries Co	9%
Daewoo Shipbuilding & Marine	6%
Zhejiang Shipbuilding Co Ltd	4%
Fujian Southeast Shipyard	4%
Hyundai Heavy Industries Co	3%
Fujian Mawei Shipbuilding Ltd	3%
Damen Shipyards Group	2%
Jurong Shipyard Pte Ltd	2%
IHC Offshore & Marine	1%
Guangzhou Huangpu Shipbuilding	1%

Ship owners - Offshore



Bourbon SA	4%
Seadrill Ltd	2%
Tidewater Inc	2%
ENSCO International Inc	2%
Edison Chouest Offshore LLC	2%
Pacific Drilling Services Inc	2%
Odfjell JO	2%
China Govt	2%
Nam Cheong Dockyard Sdn Bhd	2%
Atwood Oceanics Inc	1%

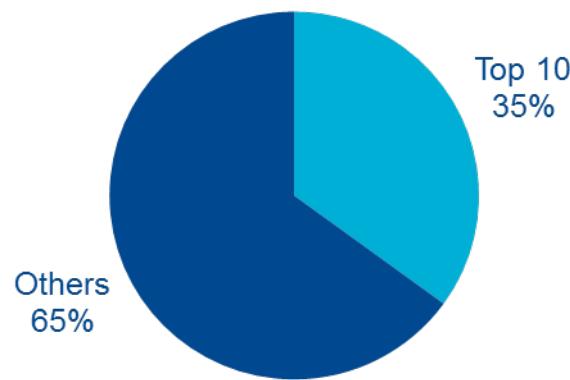
Source: Internal, 2008 - 2013, addressable market, vessel contracting, by value

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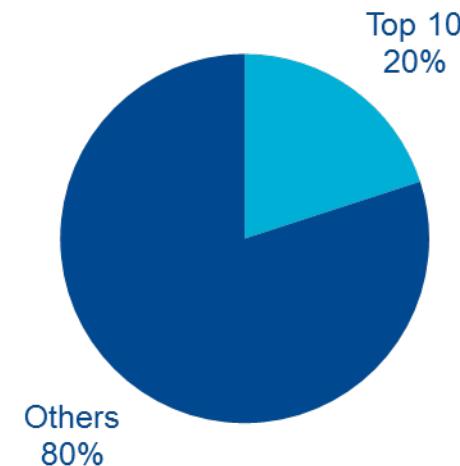
# Top 10 merchant companies

Shipyards - Merchant



Hyundai Heavy Industries Co	8%
Daewoo Shipbuilding & Marine	6%
Samsung Heavy Industries Co	5%
Hyundai Samho Heavy Industries	3%
STX Shipbuilding Co Ltd	3%
Hyundai Mipo Dockyard Co Ltd	2%
Imabari Shipbuilding Co Ltd	2%
Sungdong Shipbuilding & Eng	2%
HHIC-Phil Inc	2%
Dalian Shipbuilding Industry	2%

Ship owners - Merchant



COSCO	5%
Moller-Maersk A/S	3%
Seaspan ULC	2%
Mitsui OSK Lines Ltd	2%
Evergreen Marine Corp	2%
Neptune Orient Lines Ltd	2%
United Arab Shipping Co	1%
NYK Line	1%
Zodiac Maritime Agencies Ltd	1%
Peter Doeple Schiffahrts-KG	1%

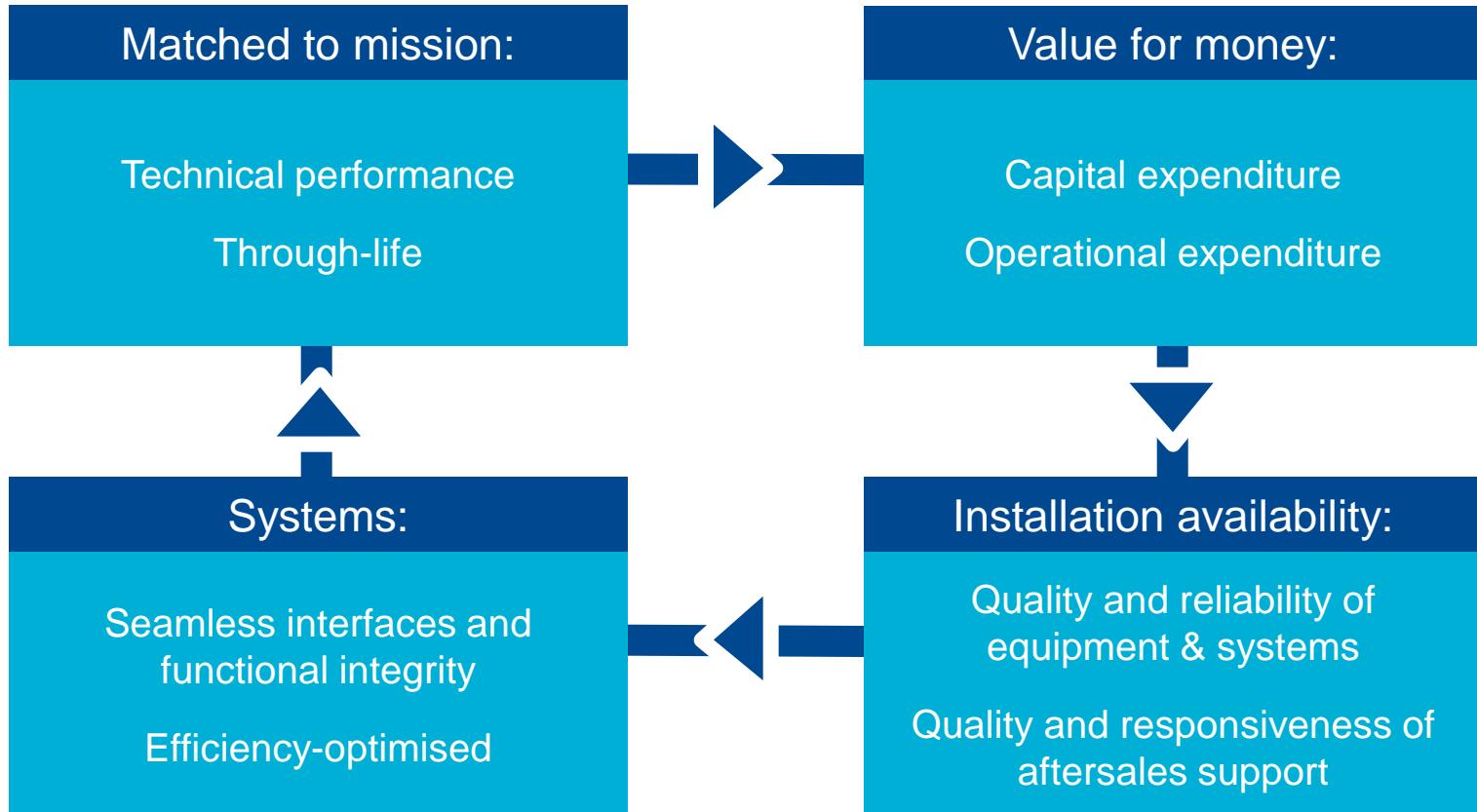
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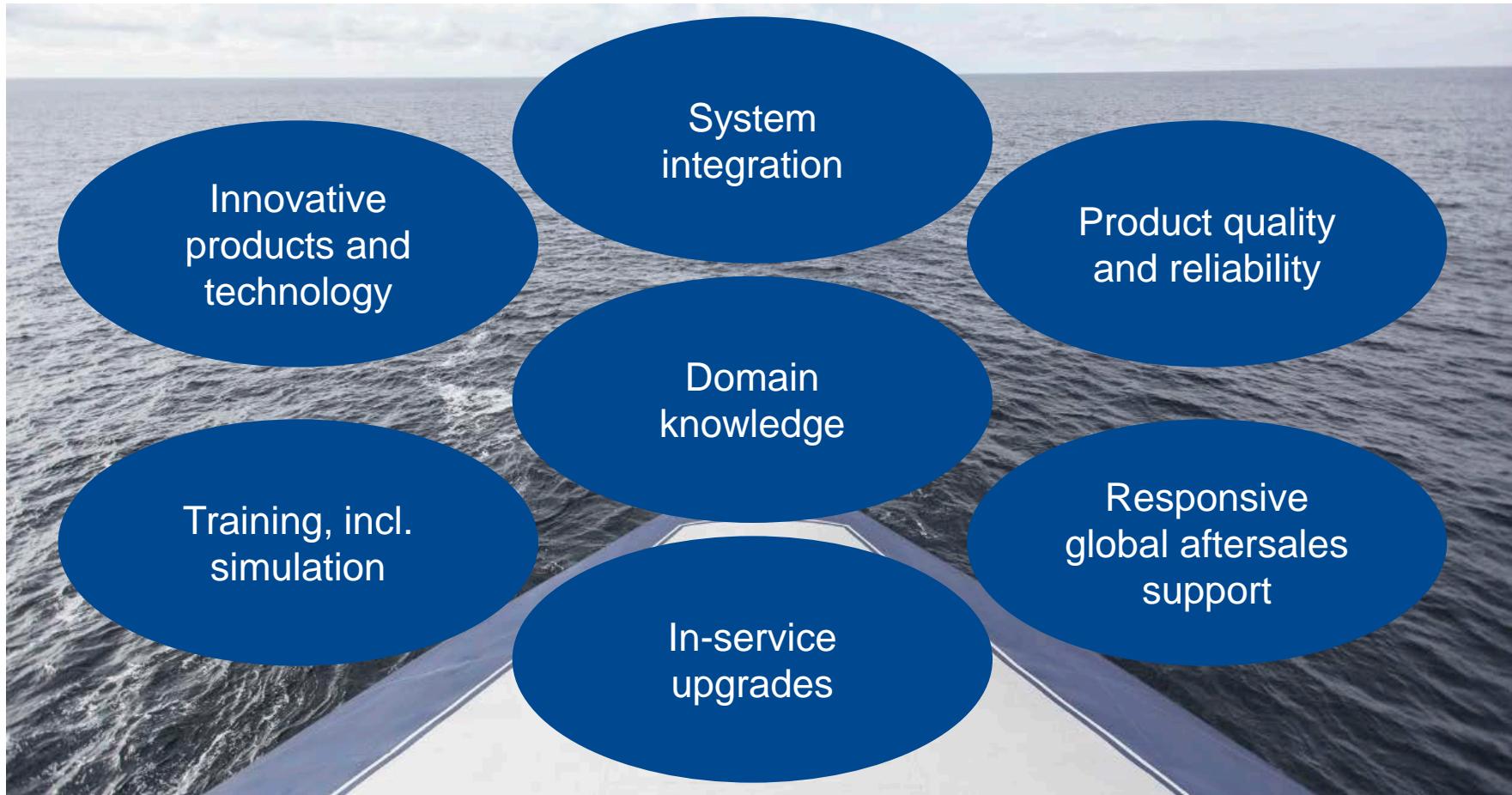
# Customer requirements

Diverse, with common themes



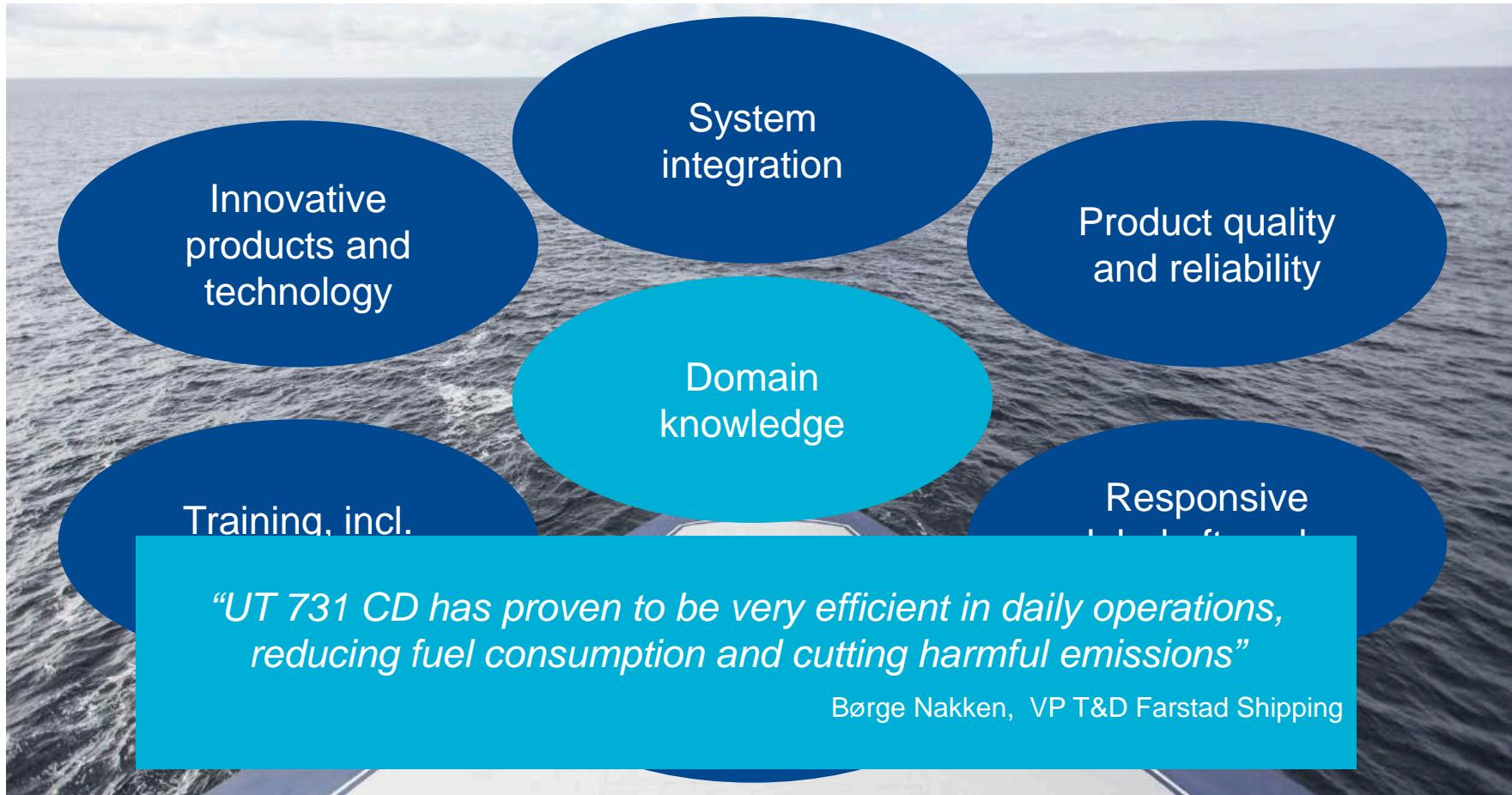
# Value proposition

Creating high barriers to entry



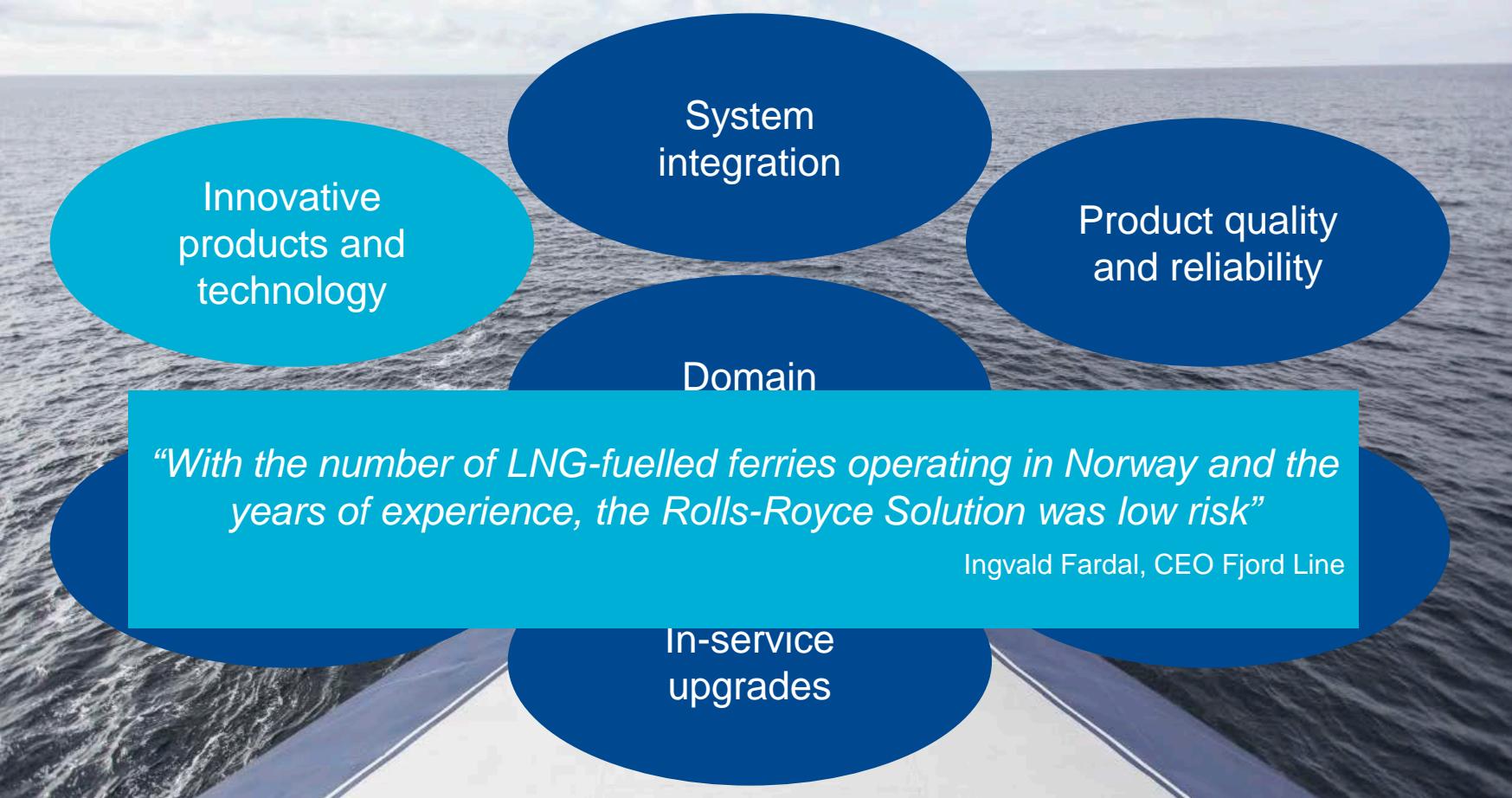
# Value proposition

Domain knowledge



# Value proposition

Innovative products and technology



Innovative products and technology

System integration

Product quality and reliability

Domain

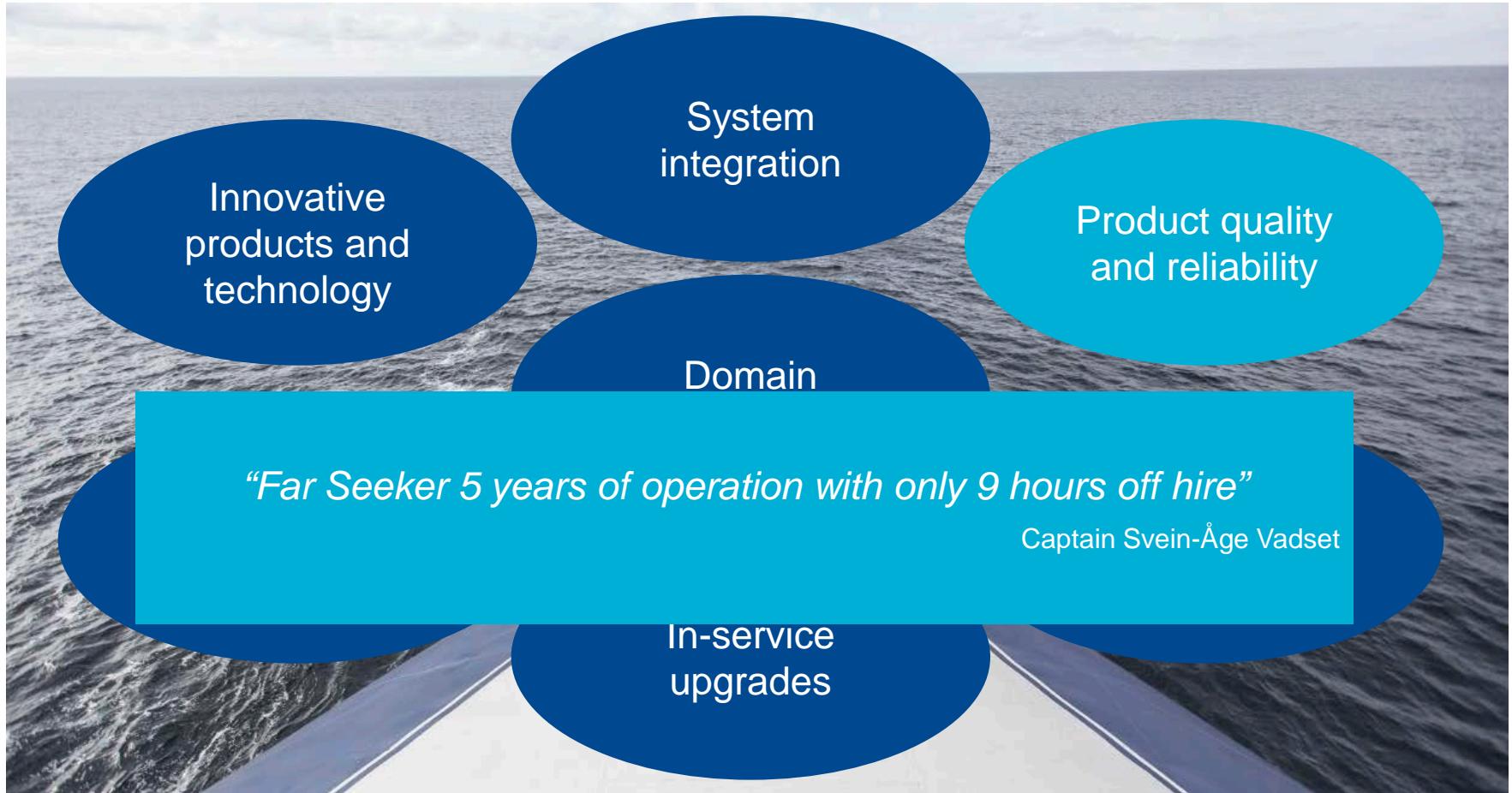
*“With the number of LNG-fuelled ferries operating in Norway and the years of experience, the Rolls-Royce Solution was low risk”*

Ingvald Fardal, CEO Fjord Line

In-service upgrades

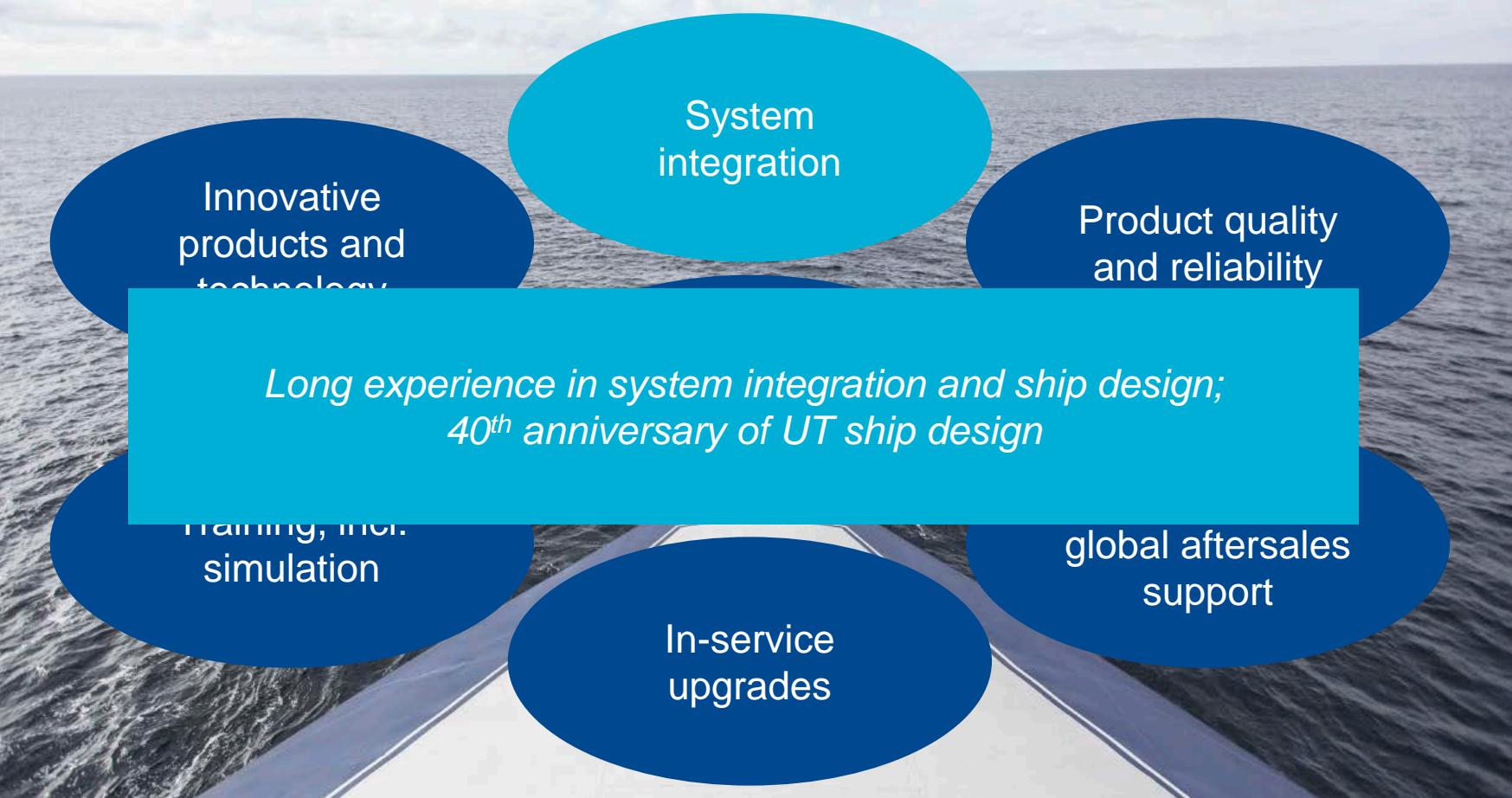
# Value proposition

Product quality and reliability



# Value proposition

## System integration



System integration

Innovative products and technology

Product quality and reliability

*Long experience in system integration and ship design;  
40<sup>th</sup> anniversary of UT ship design*

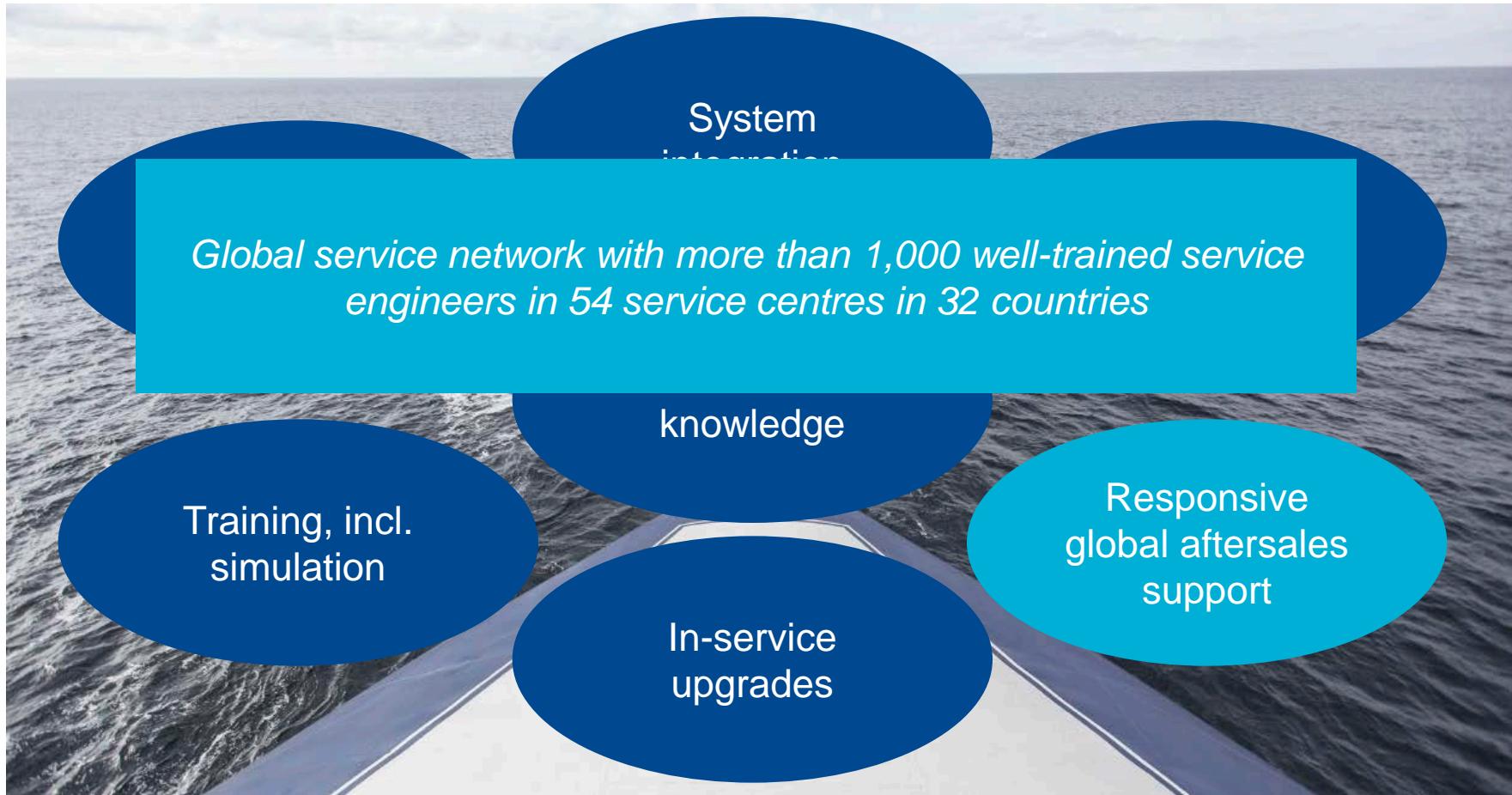
Training, incl.  
simulation

global aftersales support

In-service upgrades

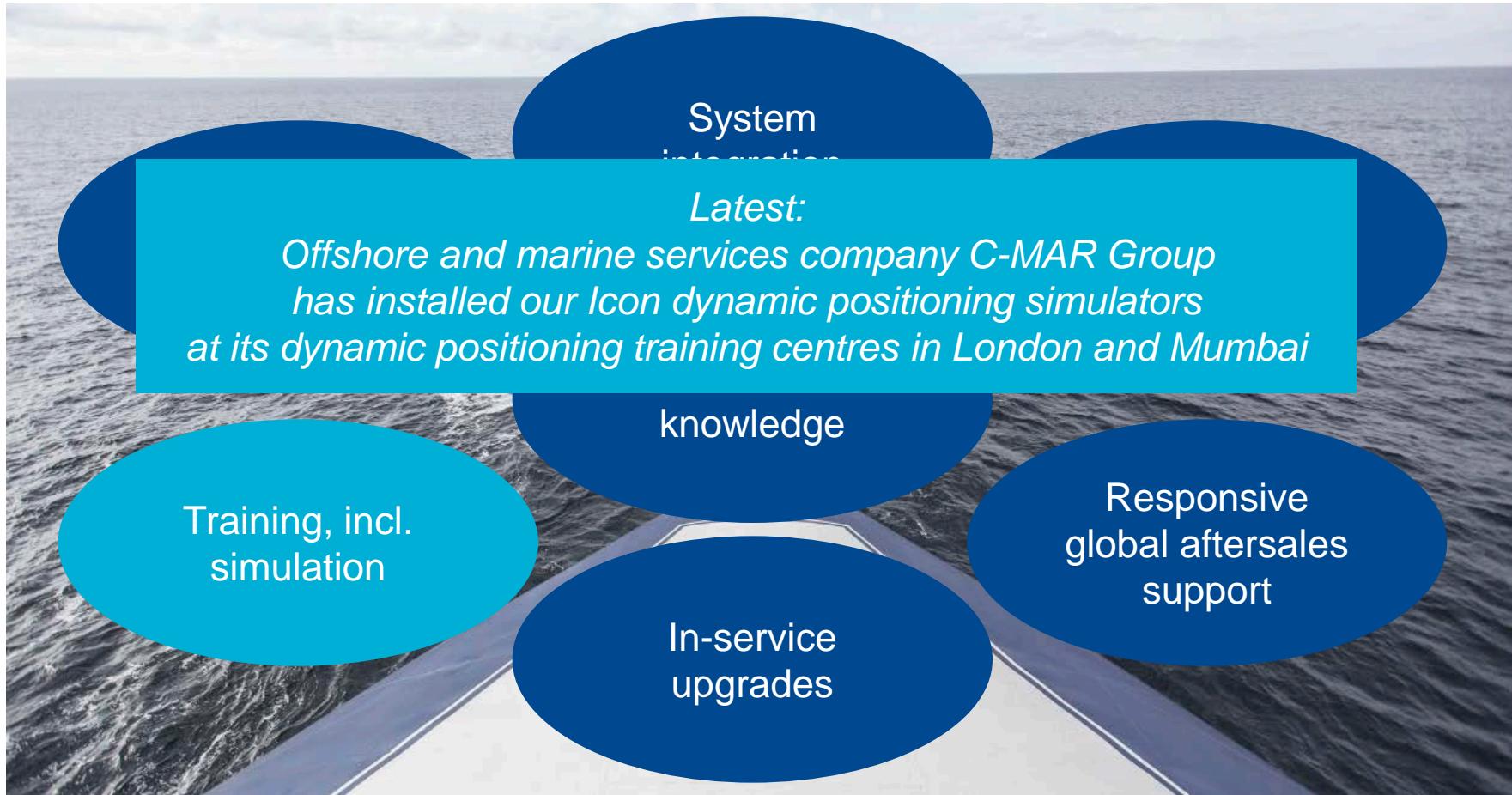
# Value proposition

Responsive global aftersales support



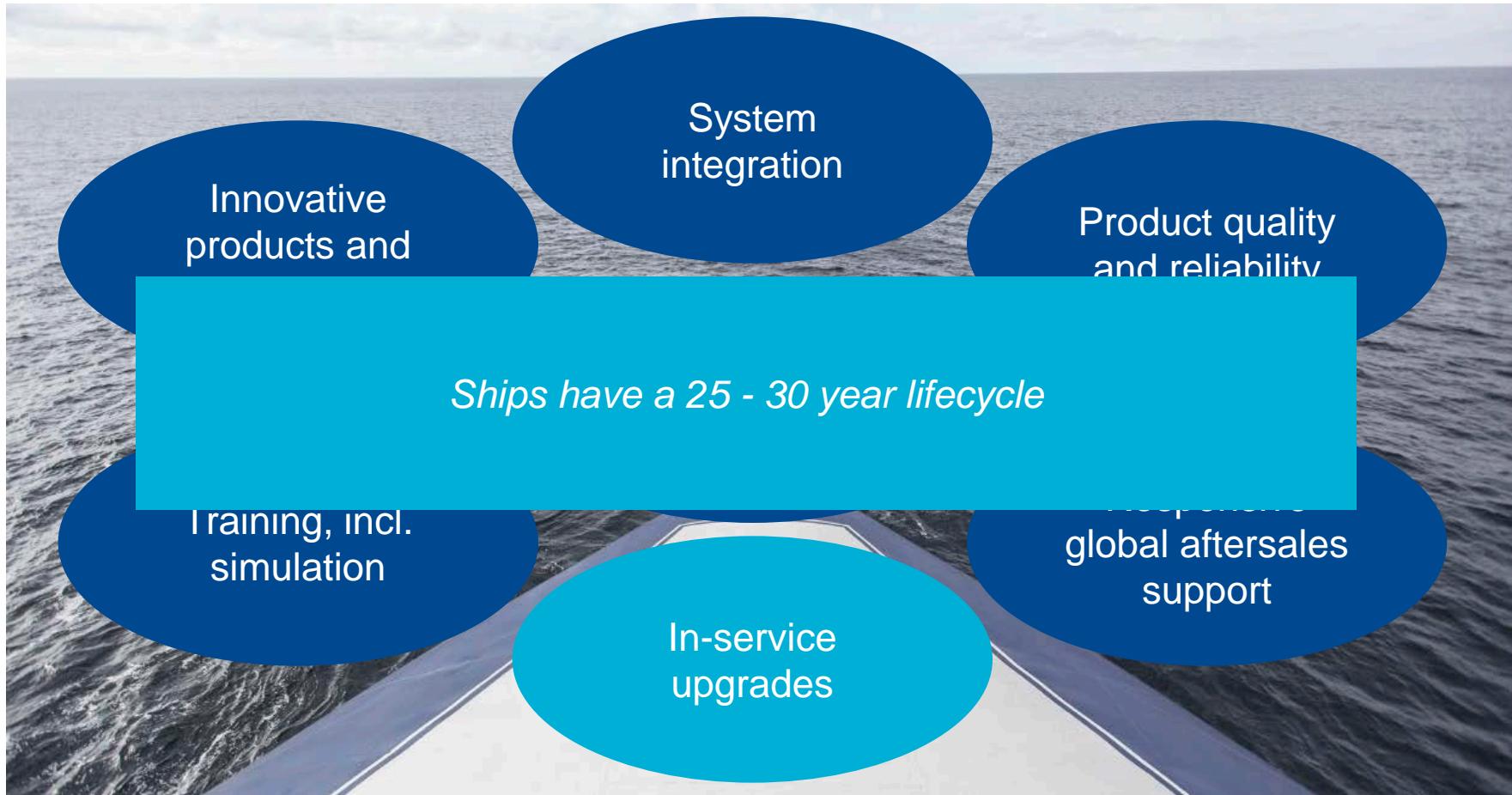
# Value proposition

Training, incl. simulation



# Value proposition

## In-service upgrades



# Two of our latest achievements

Based on true domain knowledge and customer intimacy

Unified bridge



UT 777 top hole drilling, light well-intervention and subsea construction vessel



*Award winning*

*World class operability*

# Examples

## Offshore



UT design anchor handling vessel

## Offshore



Drilling semi-submersible

## Merchant



1,600 passenger LNG-powered ferry

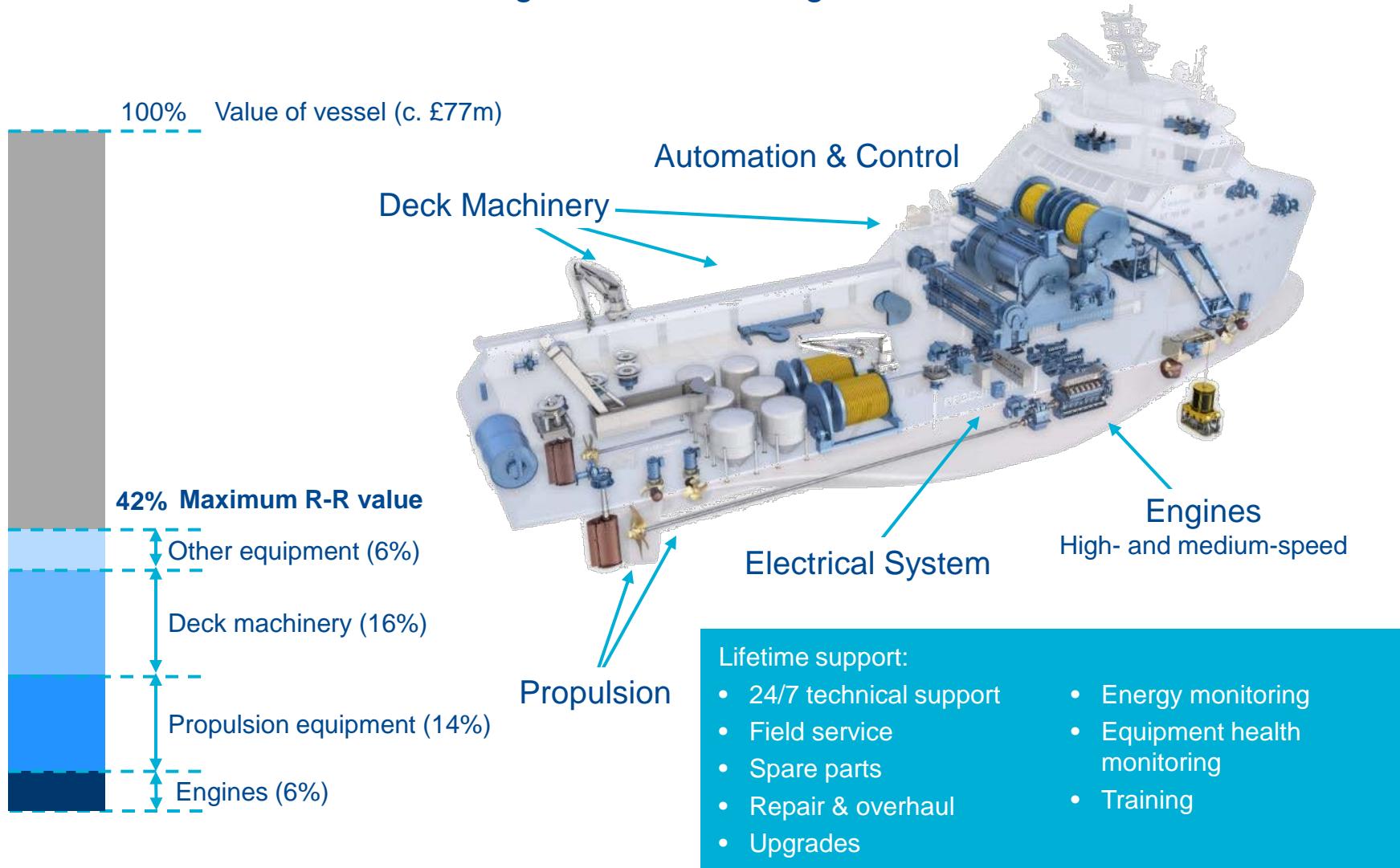
## Naval



Frigate

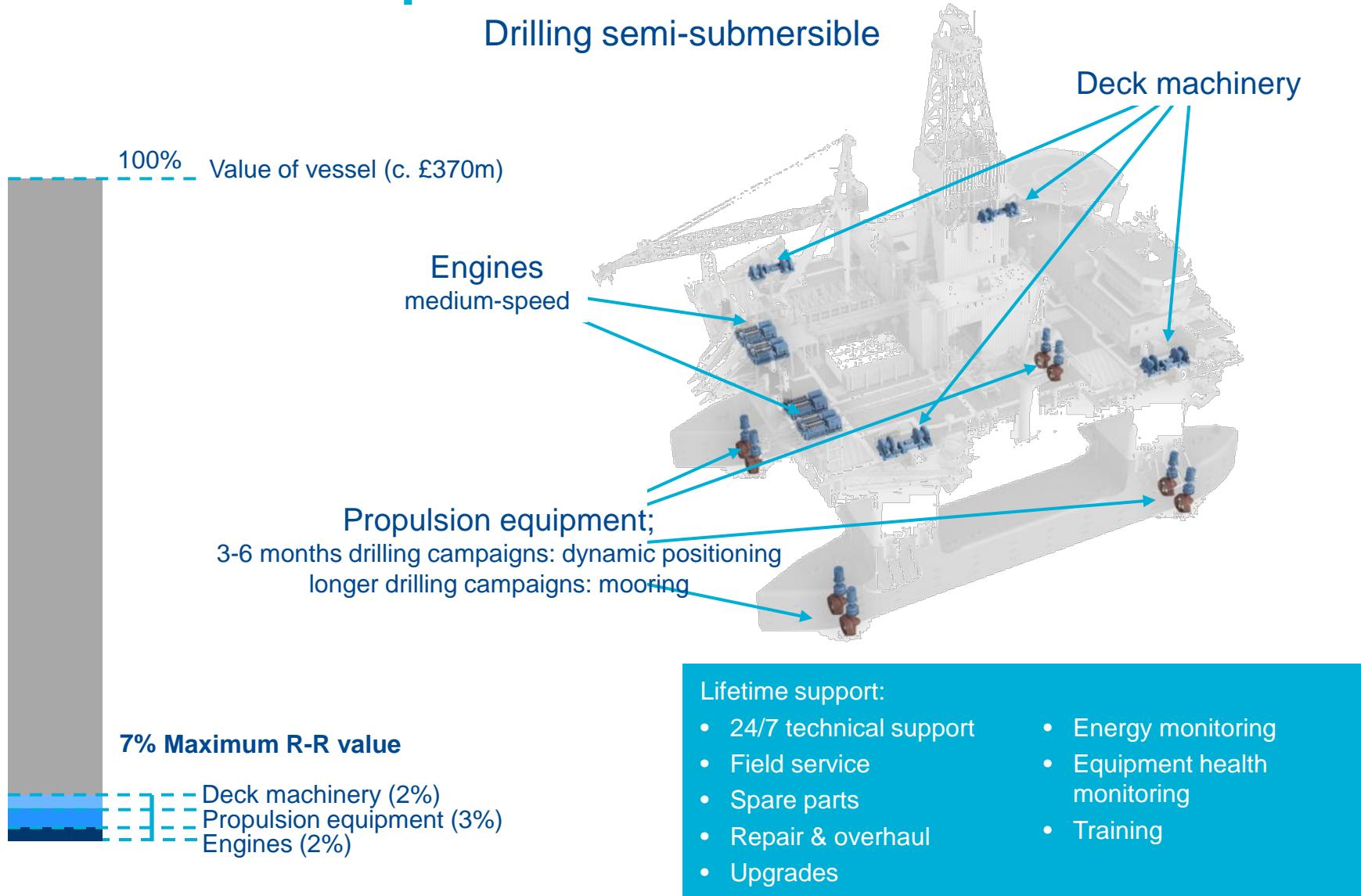
# Example for the offshore market

Large anchor handling vessel



# Example for the offshore market

## Drilling semi-submersible



# “Troll A” gravity based production platform

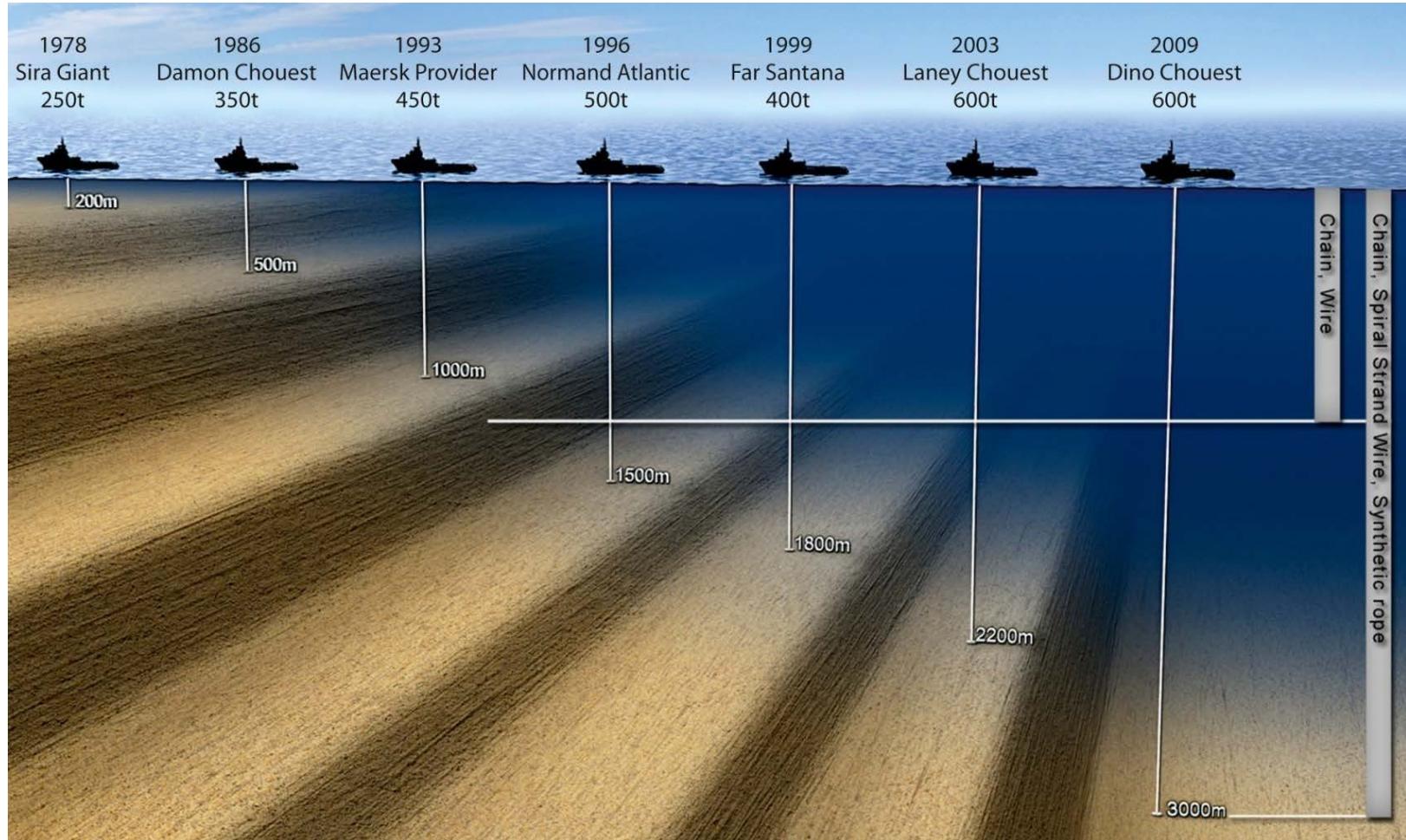
The largest structure ever moved on earth

All ten vessels featuring Rolls-Royce deck machinery winches



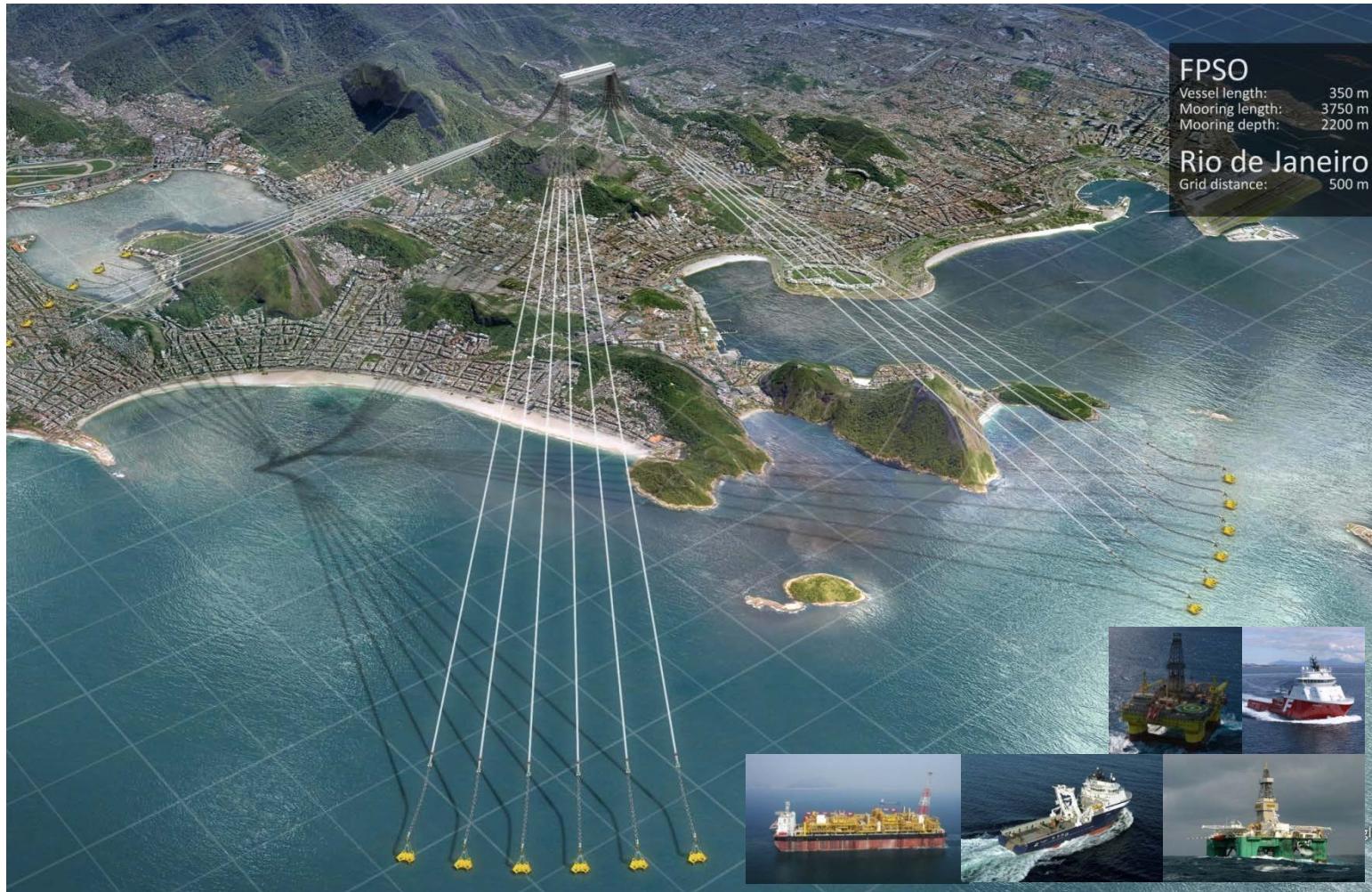
# Deep water mooring

From 200 to 3,000 metres



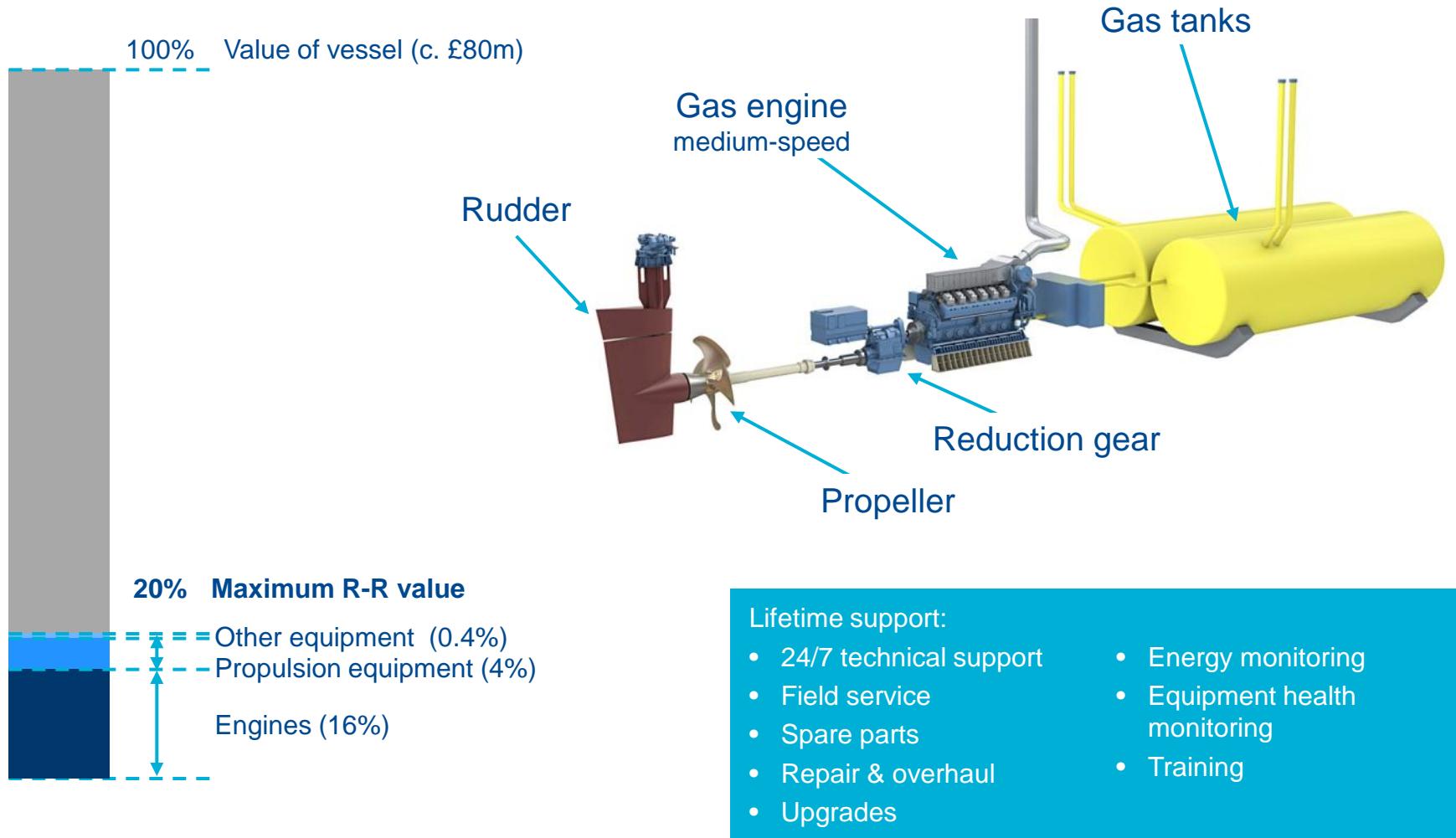
# Mooring of an FPSO

## Floating Production Storage & Offloading



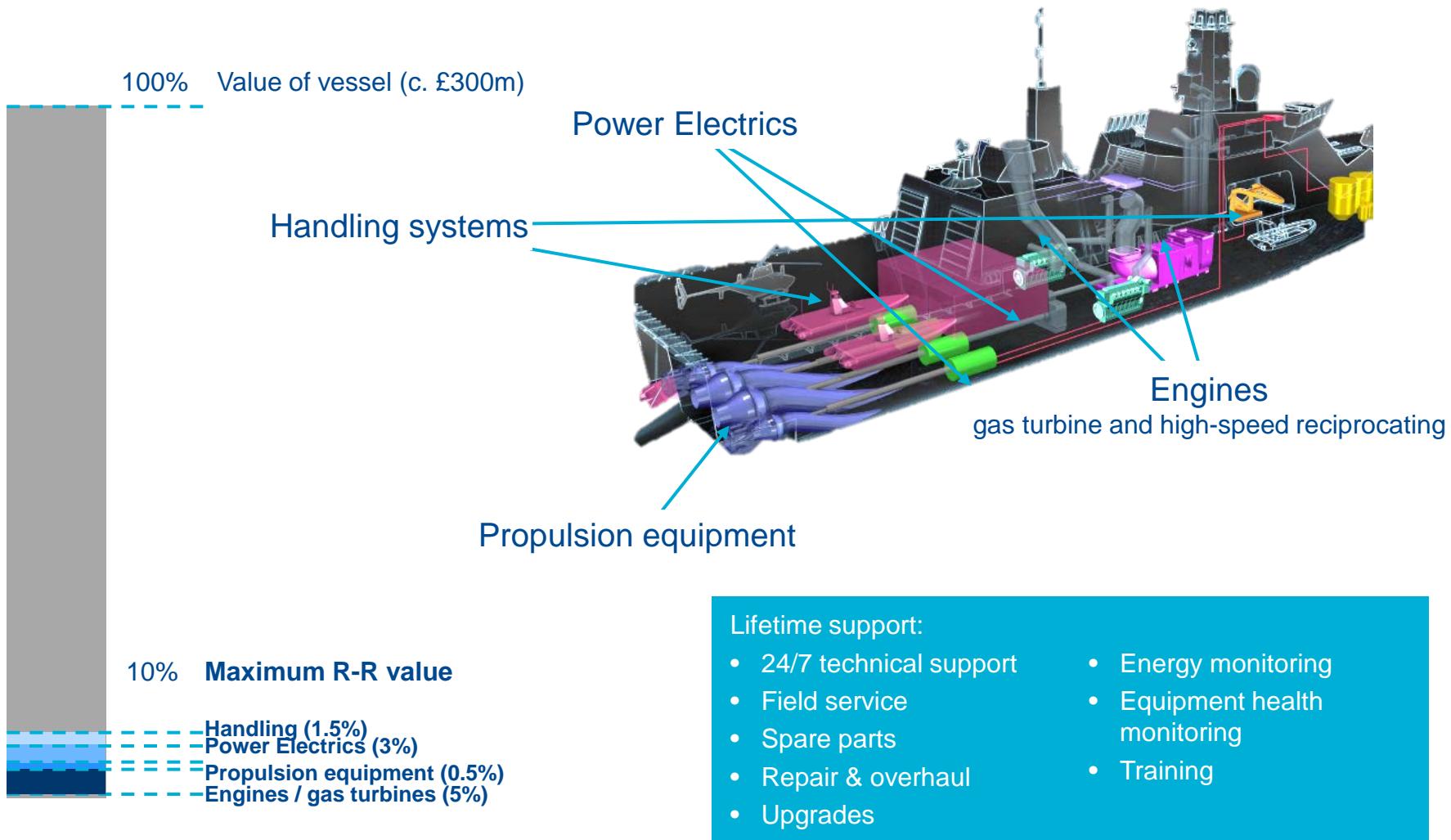
# Example for the merchant market

1,500 passenger / 600 car LNG-powered ferry



# Example for the naval market

## Frigate



# Competition

Fragmented and diverse landscape



# Going forward

In parallel

Raise quantity of business:

Grow with addressable market

Grow share in addressable  
market

Expand addressable market

Raise quality of business:

Continuous improvement of our  
strong value proposition

Relentless focus on cost and  
operational efficiency

