Working As One Survey 2025

Analysis of Results

Report Number: AST-OEUK-02-RP-001 Rev 1

Prepared by

Astrimar Ltd

On behalf of

OEUK

Commercial-in-Confidence

Astrimar Ltd
Cranfield Innovation Centre
University Way
Cranfield, Bedfordshire
MK43 0BT
UK

OEUK
Annan House
33-35 Palmerston Road
Aberdeen
AB11 5QP
UK

DOCUMENT CONTROL SHEET

Client: OEUK

Report Title: Working As One Survey 2025

Document History

Revision	Date	Purpose	Prepared	Checked	Approved
A	04/12/2025	Draft Report for initial review and feedback	EMG	PD	BW/CRH
B	08/12/2025	Draft Report with initial client feedback incorporated	EMG	CRH	CRH
0	16/12/2025	Issued Report with client comments incorporated	EMG	CRH	CRH
1	13/01/2026	Issued Report with additional client comments incorporated	EMG	CRH	CRH

Notice

1. EXECUTIVE SUMMARY

OEUK commissioned the Working As One collaboration survey to help companies understand how they work together in the industry. This year's version of the Working As One survey, managed by Astrimar, was launched in May 2025. It was designed to build upon the previous 2021 & 2023 Working as One surveys and other earlier collaboration surveys previously undertaken by Deloitte.

Members of OEUK are able to own and publish a survey with the intent to measure the extent of cooperative business behaviours within their supply chains as well as to also encourage their suppliers to rate the cooperative behaviours of their clients.

The survey was structured around the 10 OEUK Supply Chain Principles with the purpose of developing an understanding of the adoption of the principles by industry. Survey results and feedback will provide data and insights for future industry publications aimed at driving continuous improvement in business collaboration and competitiveness.

A key objective of the survey was to gain as much feedback from the greatest group of individuals and organisations as possible. To this end, the survey was distributed by providing ownership of individual surveys to participating Operator and Tier 1 companies, so they could then distribute this onto their own supply chains, as well as to allow the Supply Chain companies to request a survey to complete too.

To maximise uptake of the survey, the duration of the survey was extended to the start of September 2025, enabling more Operators, Developers and Tier 1 contractors to generate their own supply chain feedback.

Overall, 37 purchasing companies (Operator/Developer or Tier 1 supply chain companies) based in the UK Continental Shelf (UKCS) registered to participate in the survey. In addition, a generic survey was created which would allow anyone to also respond independently for a company of their choice. Of the 37 surveys, 13 companies received no more than 1 response each, leaving 24 company surveys for which a total of 427 responses were received.

Individual company reports were provided to 23 of the survey owners, which received enough responses (10 or more) to their survey. These reports were based on the responses received to their individual surveys, but also included anonymised comparative rankings to the other participating companies. These reports are distributed by OEUK directly to the respective companies. Of the 23 companies, 17 also participated in the 2023 survey which meant that their individual reports benefited from including a comparison to their previous results.

For the overall report, the results have been anonymised with respect to the survey owners, and then aggregated. An analysis and interpretation of the results is also presented. Comparisons were also made between the 2023 and 2025 iterations of the survey to reveal how the industry has developed in relation to the Supply Chain Principles, and to identify any changes in performance.

For the comparative rankings within the Individual company reports, participating companies were split into 2 distinct categories, either "Operators/Developers", or "Tier 1 Suppliers", however in the overall report, Operator/Developers are split into 3 further categories, Independents, International Oil Companies (IOCs), and National Oil Companies (NOCs).

CONTENTS

Table of Figures

Tables of Tables

2. INTRODUCTION

OEUK commissioned the Working As One collaboration survey to help companies understand how they work together in the industry. The survey launched at the end of May 2025 and was made open to all OEUK members with the intention to measure the extent of cooperative business behaviours within the supply chain. The Working As One survey is managed by Astrimar on behalf of OEUK and this year's survey was built upon the previous 2023 and 2021 iterations of the survey, which were also managed by Astrimar. Prior to this, earlier collaboration surveys were undertaken by Deloitte. The objective is to understand collaboration within the UK Continental Shelf (UKCS) upstream supply chain. As with the previous surveys, individual purchasing companies were able to provide surveys of their own which could be issued directly to their supply chain – meaning companies were able to obtain feedback directly from their suppliers and also measure their performance with respect to the cooperative behaviours of their peers, as well as their clients (if also participants).

The survey was structured around the 10 OEUK Supply Chain Principles with the intention of developing an understanding of the uptake of the principles by industry, along with sections to capture demography and overall sentiment.

The electronic survey was conducted using Microsoft Forms, with all responses anonymous – no personal data was stored or requested from respondents. The survey was active from 28 May to 12 September 2025 and survey responses were aggregated across individual company surveys.

There were 37 individual surveys requested by companies based in the UKCS along with a generic survey which would allow anyone to also respond in the context of a selected company, if not requested directly to do so by that company. Of the 37 surveys, 13 companies received no more than 1 response each, leaving 24 company surveys for which a total of 427 responses were received.

This overall report presents the results from all the individual surveys; anonymised and aggregated within and across organisations. Key observations from the survey results are identified, along with comparisons between organisation types and previous survey results from 2023. The intention is for the feedback from the survey to provide data for future industry publications aimed at driving continuous improvement in business collaboration and competitiveness.

The complete set of anonymised results are made available in PowerBI along with an interactive dashboard, allowing for the data to be visualised, filtered, and sliced.

2.1. OEUK’s Supply Chain Principles

The 10 OEUK Supply Chain Principles are defined below.

Supply Chain Principle 1: Risk and Reward Risks and costs should be borne appropriately, proportional to the work scope and the opportunity for good performance should benefit everyone.
Supply Chain Principle 2: Payment Performance & Contract Terms Contractual terms and conditions will seek to utilise industry standards including mutual payment terms. Buyers shall strive towards supporting the Government Prompt Payment Code and 30-day payment terms.
Supply Chain Principle 3: Competency & Skills All parties should ensure they have the competence and skills to deliver the work being tendered.
Supply Chain Principle 4: Visibility of Work Purchasers shall provide visibility of upcoming work scopes. Contract cancellations should not be without good reason or cause.
Supply Chain Principle 5: Tendering & Auditing Requirements Purchasers shall endeavour to optimise their tendering and audit requirements to respect the supplier’s time and resources.
Supply Chain Principle 6: Innovation Tender processes and evaluation should be based on value added rather than unit rates and be flexible to evaluate alternative offers as part of the bidding process.
Supply Chain Principle 7: Alternative Bids An alternate bid (either technical or commercial) which a buyer sees as a winning proposition should be selected for award on its merit.
Supply Chain Principle 8: Low-ball Bidding Buyers and suppliers should discourage the practice of “low-ball” bidding which will lead to contracts being renegotiated early on.
Supply Chain Principle 9: Rate Review Mechanisms Buyers should agree clear rate escalation mechanisms and move away from the practice of fixing labour rates for several years.
Supply Chain Principle 10: Dispute Resolution Where a supplier (or potential supplier) feels unfairly treated, it should notify the buyer’s CEO to ensure that speaking up is not held against it.

3. METHODOLOGY

3.1. Ranking approach based on survey sections

The survey consisted of 12 sections including one section on demography, a section for each of the 10 supply chain principles, and a final overall rating section. There were a total of 48 questions, as well as the opportunity for respondents to provide free-text comments in relation to each supply chain principle. All answers are anonymous. The results presented in this report are the aggregated responses from all 427 responses.

For the ranking of participating companies, 33 questions from the survey were selected in agreement with OEUK, across all of the Supply Chain Principle sections. Supply Chain Principle 9 was previously excluded from the individual survey reports, however, this year the questions were updated such that it could be included and scored.

Only companies which received 10 or more responses to their individual surveys were included in the company rankings. Note that in 2023, this was set to 7 or more response.

3.2. Selection of weightings and scores

All questions were equally weighted within each section such that the total score for each section was out of 10. Answers to questions were similarly scored with values between 0 and 10, where 10 was the most positive answer and in complete agreement or support of the question or statement, and 0 was the least positive possible answer.

An overall rank was calculated using the average of the scores for each of the included sections (i.e., Equally weighted). This meant that the overall rank was calculated on a scale between 0 and 10, where 10 was the most positive and 0 was the least positive.

Following previous survey analysis convention, the scores for “Don’t Know” answers were not included within the scoring as it was felt that a “Don’t Know” was not similar in implication to a “No” or “Never”. For example, when asked “Are you able to maximise full potential in adding value through innovation?”, it was felt that the answers of “No” and “Don’t know” were not equivalent. Therefore, “Don’t know” answers were excluded from the scoring.

Table 3.1 below shows how the scores were allocated for each possible answer for every question included in the overall ranking. This is based on discussion and agreement with OEUK prior to the issue of the survey.

Table 3.1: Allocation of scores for each possible question response

Section and Question	Answers and Score					
Supply Chain Principle 1	Risk & Reward					
Potential risks and rewards are objectively discussed and evaluated before contract start and shared fairly.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
Risk and reward is formally reviewed with the customer during the contract life cycle.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
My organisation has been able to amend commercial contracts with this customer to rebalance risk and reward.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
Supply Chain Principle 2	Payment Performance & Contract Terms					
The accounts payable (AP) process is provided in a timely manner and is clearly explained	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
The process for invoice dispute resolution is clearly explained	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
Reasons for invoice rejection are clearly explained	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
What are the standard payment terms?	30 days or less	31-45	46-60	61-75	76 days +	
	10	7	5	3	0	
What percentage of correctly submitted invoices are paid on time as per the contractual terms and conditions?	95-100%	80-94%	65-79%	50-64%	25-49%	0-24%
	10	7	5	3	0	0
Which type of contract is the main basis for your commercial relationship?	Standard Contracts (e.g. LOGIC) with minimal special conditions	Standard Contracts (e.g. LOGIC) with significant special conditions	Bespoke/Client Terms			
	10	3	3			

Supply Chain Principle 3	Competency & Skills	
Are the competency and skills required for the work clearly defined in a Scope of Work?	Yes	No
	10	0
Does the customer require you to demonstrate or provide evidence of the competency and skills of those undertaking the work?	Yes	No
	10	0

Supply Chain Principle 4	Visibility of Work		
Have you had a contract cancelled or terminated early by the customer?	No	Yes, the reason for cancellation was well explained	Yes, the reason for cancellation was not explained
	10	10	0

Do you regularly receive customer activity forecasts and forward work plans?	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0

How reliable are the customer's forward work plans?	95-100%	80-94%	65-79%	50-64%	25-49%	0-24%
	10	7	5	3	0	0

Supply Chain Principle 5	Tendering & Auditing Requirements				
There are opportunities to engage with the customer at the pre-tender stage, to help inform what is being tendered for	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
The tender process is efficient.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0

Does the customer conduct repetitive tendering for the same or similar scopes of work?	Yes	No
	0	10
Does the customer request information that is already available in pre-qualification systems, or which has been provided previously through another means?	Yes	No
	0	10
Are the audit requirements suitable and efficient?	Yes	No
	10	0

<table>
<tr><th>Supply Chain Principle 6</th><th colspan="60">Innovation</th></tr>
<tr><td rowspan="2">We are invited or given the opportunity to provide new ideas or alternative bids as part of the tendering process</td><td colspan="12">Yes, all the time (100%)</td><td colspan="12">Yes, most the time (>66%)</td><td colspan="12">Sometimes (33-66%)</td><td colspan="12">Rarely (<33%)</td><td colspan="12">Never (0%)</td></tr>
<tr><td colspan="12">10</td><td colspan="12">7</td><td colspan="12">5</td><td colspan="12">3</td><td colspan="12">0</td></tr>
<tr><td rowspan="2">We are engaged with the customer to discuss work scopes outside of the tender process to encourage innovative approaches</td><td colspan="12">Yes, all the time (100%)</td><td colspan="12">Yes, most the time (>66%)</td><td colspan="12">Sometimes (33-66%)</td><td colspan="12">Rarely (<33%)</td><td colspan="12">Never (0%)</td></tr>
<tr><td colspan="12">10</td><td colspan="12">7</td><td colspan="12">5</td><td colspan="12">3</td><td colspan="12">0</td></tr>
<tr><td rowspan="2">We receive constructive feedback on the outcome of our bids</td><td colspan="12">Yes, all the time (100%)</td><td colspan="12">Yes, most the time (>66%)</td><td colspan="12">Sometimes (33-66%)</td><td colspan="12">Rarely (<33%)</td><td colspan="12">Never (0%)</td></tr>
<tr><td colspan="12">10</td><td colspan="12">7</td><td colspan="12">5</td><td colspan="12">3</td><td colspan="12">0</td></tr>
<tr><td rowspan="2">Are you able to maximise full potential in adding value through innovation?</td><td colspan="20">Yes</td><td colspan="20">No</td><td colspan="20">Don’t Know</td></tr>
<tr><td colspan="20">10</td><td colspan="20">0</td><td colspan="20">Not Scored</td></tr>
<tr><th>Supply Chain Principle 7</th><th colspan="60">Alternative Bids</th></tr>
<tr><td rowspan="2">Do tender processes allow for the submission of alternative proposals to be considered?</td><td colspan="12">Yes, all the time (100%)</td><td colspan="12">Yes, most the time (>66%)</td><td colspan="12">Sometimes (33-66%)</td><td colspan="12">Rarely (<33%)</td><td colspan="12">Never (0%)</td></tr>
<tr><td colspan="12">10</td><td colspan="12">7</td><td colspan="12">5</td><td colspan="12">3</td><td colspan="12">0</td></tr>
<tr><td rowspan="2">Do you ever get asked to price against alternative solutions which were shared by another bidder?</td><td colspan="30">Yes</td><td colspan="30">No</td></tr>
<tr><td colspan="30">0</td><td colspan="30">10</td></tr>
<tr><td rowspan="2">Have any alternative bids/proposals submitted by you to this customer been successful?</td><td colspan="15">Yes</td><td colspan="15">No, the reason for rejection was well explained</td><td colspan="15">No, the reason for rejection was not explained</td><td colspan="15">My organisation has not submitted an alternative bid</td></tr>
<tr><td colspan="15">10</td><td colspan="15">10</td><td colspan="15">0</td><td colspan="15">Not scored</td></tr>
<tr><th>Supply Chain Principle 8</th><th colspan="60">Low-ball Bidding</th></tr>
<tr><td rowspan="2">Have you been encouraged by the customer to submit pricing or rates which are unsustainable? i.e., low-ball bidding</td><td colspan="30">Yes</td><td colspan="30">No</td></tr>
<tr><td colspan="30">0</td><td colspan="30">10</td></tr>
<tr><td rowspan="2">Has a contract required renegotiating due to unsustainable pricing?</td><td colspan="30">Yes</td><td colspan="30">No</td></tr>
<tr><td colspan="30">0</td><td colspan="30">10</td></tr>
<tr><td rowspan="2">My organisation makes a profitable return with this customer</td><td colspan="12">Yes, all the time (100%)</td><td colspan="12">Yes, most the time (>66%)</td><td colspan="12">Sometimes (33-66%)</td><td colspan="12">Rarely (<33%)</td><td colspan="12">Never (0%)</td></tr>
<tr><td colspan="12">10</td><td colspan="12">7</td><td colspan="12">5</td><td colspan="12">3</td><td colspan="12">0</td></tr>
</table>

Supply Chain Principle 9	Rate Escalation				
Do your commercial contracts have clear rate escalation mechanisms that are supported and recognised? Note: This SCP was not scored in 2023.	Yes		No		
	10		0		
Supply Chain Principle 10	Dispute Resolution				
Do you ever need to escalate disputes to managing director or senior management level for effective resolution?	Yes		No		
	0		10		
Do you receive constructive feedback from your customer?	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
Concluding Question					
How would you rate your overall relationship with your customer?	5	4	3	2	1
	10	7	5	3	0

3.3. Free text responses

All sections included free text questions, enabling respondents to provide additional comments and feedback. Due to the volume and sensitivity of some of these responses, these are not included in full within this report, instead they are summarised for each section within the discussion section.

Microsoft Copilot was used to generate summary paragraphs for each of the free text questions. In order to do this, comma separated value (CSV) files were created for each SCP that contained all of the fully anonymised free text responses to that section. This was input into Copilot with the following prompt:

"I have provided a CSV file where each row contains one open-text survey comment related to [SCP Topic]. Please summarise the comments into 150 words."

The comments were anonymised prior to the creation of the CSV files to remove any names, locations, projects or businesses, and the output responses were reviewed. The 150-word summaries were saved and input into this report. The summary of the free text responses at the end of the survey, relating to the overall relationship between client and supplier was extended to 200 words due to the number of responses.

3.4. Grouping of ranked companies

Companies that received 10 or more survey responses were scored and ranked, providing an overall ranking table. There were 23 companies in total which achieved the required number of responses this year. Note that in 2023, the level was set to 7 or more responses.

For the 2023 survey, Operators were grouped based on their approximated production activity within the UKCS over the 2022-2023 period. This was done to account for and reflect an anticipated relationship between activity levels and the level of interaction with the supply chain.

This time, it has been decided that participating companies be grouped into the following categories:

- Independent – Typically smaller companies, privately owned or publicly traded, often operating in a localised national setting or with a small scope of international projects/assets. For the purposes of this report, this includes offshore wind developers.
  10 companies
- National Oil Company –Operator companies primarily owned and controlled by a national government, traditionally focussed on operations within the home country, although often also expanded to include international operations.
  4 companies
- International Oil Company – Large, privately owned, investor-oriented operator companies operating globally across many different countries.
  3 companies
- Tier 1 supplier – Major service and technology providers delivering equipment, materials, engineering, installation or operational support services to operators.
  6 companies

The new grouping was used as it was felt that the approximated production volumes did not account for decommissioning or renewables activity.

3.5. Comparisons to 2023 survey results

Where possible, comparisons have been made to the 2023 survey results, including comparison of the overall score per Supply Chain Principle or section, for individual questions, and between returning companies. Of the 23 companies which received enough responses to be eligible for a company report, 17 of those companies also participated in the 2023 survey, allowing a comparison to be made at a company level between the two years' responses.

Note that the company names are kept anonymous in this report.

4. DEMOGRAPHY

There were 37 surveys created by companies in the UKCS, of which 24 received responses which are further reported on. Of the 24, 71% were created by Operators/Developers, and 29% by Tier 1 suppliers. See Figure 4.1. This shows a consistent proportion of Tier 1 suppliers and Operators between the 2023 survey results, and Operators.

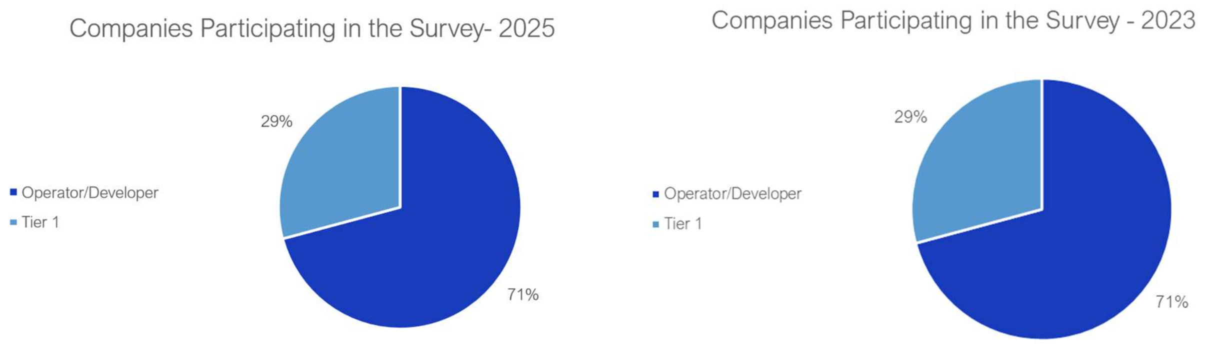


Figure 4.1: Analysis of respondents owning a survey link

Participating companies which received surveys to complete were encouraged to distribute the survey to others within their procurement department.

There were 427 survey responses received in total in 2025, which is a 4.9% improvement over the 407 received in 2023. Respondents were asked to provide the approximate size of their company. These responses are presented in Figure 4.2. The majority (56%) of responses indicated they worked for large companies, 27% for medium sized companies, 14% for small sized companies, and 4% for micro enterprises. These results are similar to the 2023 results, however further categories and updated turnover expectations were defined in 2025, limiting a direct comparison

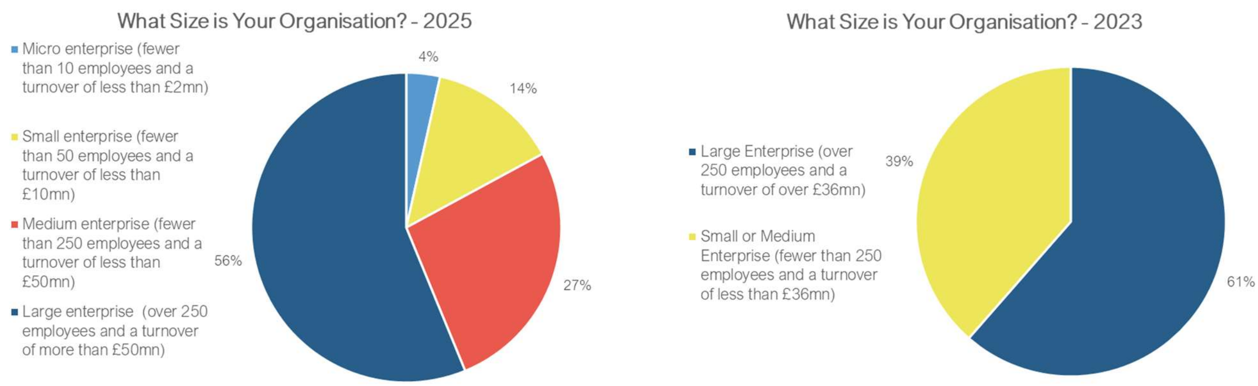


Figure 4.2: Analysis of respondent organisation type

Respondents were asked where they received the survey from. With purchasing companies able to create their own individual surveys and invite their supply chains to participate, it was encouraging to see that 89% of respondents said they were asked by their customer to complete the survey (Figure 4.3). A further 9% said they were forwarded the survey link from a colleague. Only 2% had to request a survey link from their client, and 1% used the link publicised by OEUK. Compared to the 2023 survey, a higher proportion of respondents received the survey link directly from the customer, from 80% to 89% this year.

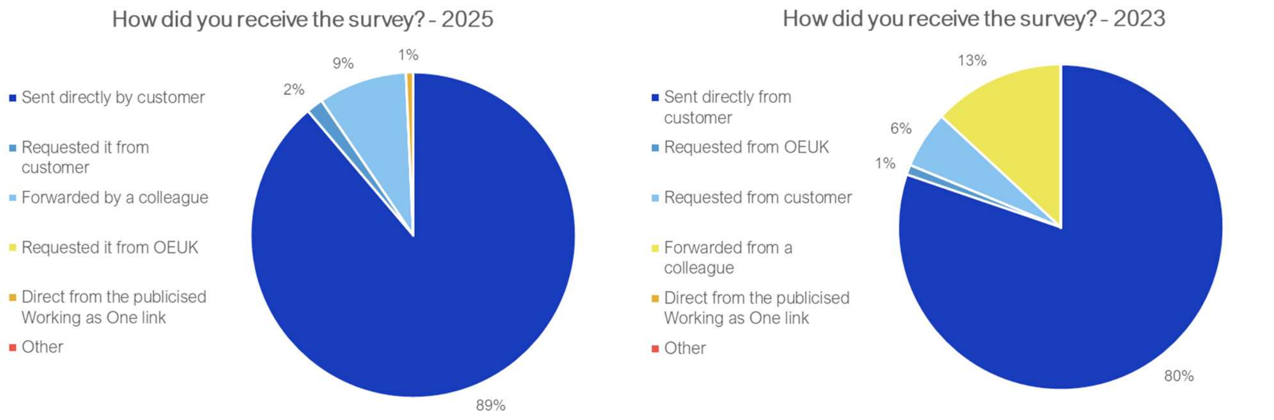


Figure 4.3: Analysis of how respondents received survey links

Respondents were asked if they believed that the Supply Chain Principles are understood and widely applied within their organisation (see Figure 4.4). 93% of respondents either strongly agreed (49%) or agreed (44%), while 5% were neutral and only 2% disagreed or strongly disagreed, as shown in Figure 4.4. Compared to the 2023 survey, more respondents agreed or strongly agreed that SCP s were understood within their organisation.

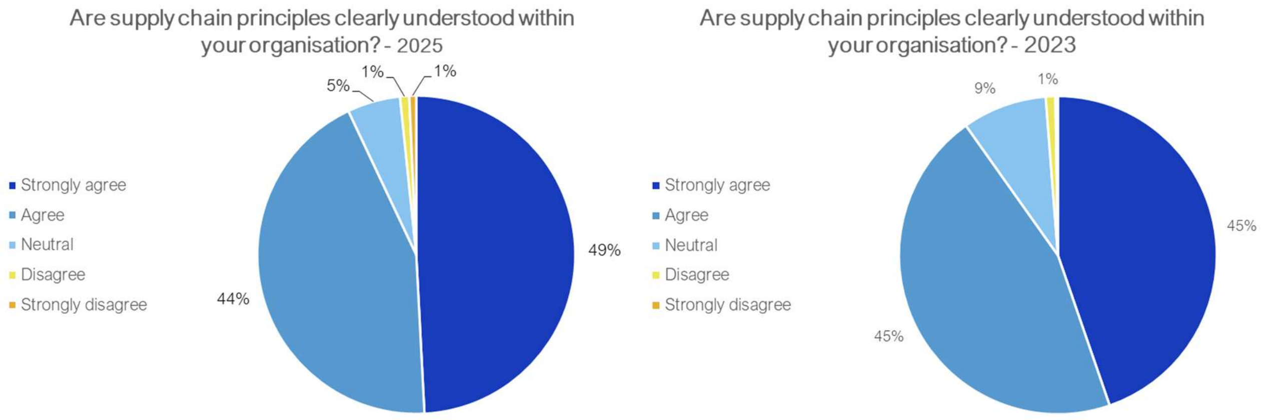


Figure 4.4: Analysis of Supply Chain Principle understanding and application.

Lastly, in this section respondents were asked if they had provided goods or services to the customer within the previous 24 months. 100% of respondents confirmed that they had, as shown in Figure 4.5. These results are very similar to the previous 2023 survey.

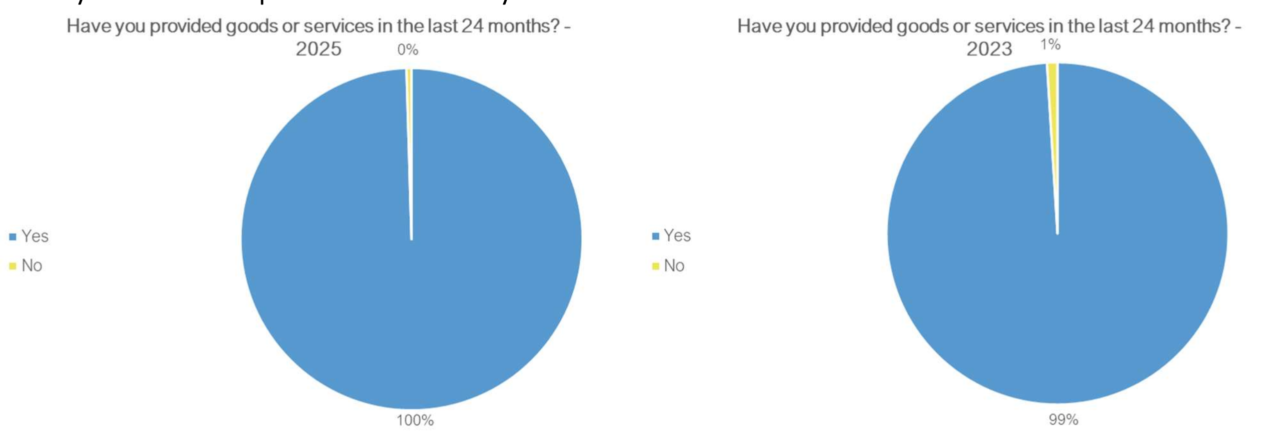


Figure 4.5: Analysis of the number of respondents who had provided goods and services to the customer.

5. PRESENTATION AND DISCUSSION OF RESULTS

5.1. Overall Average Results

This section presents the detailed results for each Supply Chain Principle. All Principles were scored according to the methodology described in Section 3. Average scores for each Supply Chain Principle were calculated for each of the respondent groups. The score achieved for each ranked section per company group is shown in Figure 5.6 and tabulated in Table 5.1 below. For comparison, the overall average score is also shown across all sections and companies, as well as the average across all operator/developer groups. For comparison the average scores by group category and overall average from the 2021 and 2023 surveys results are presented in Table 6.1 and Table 6.2 in APPENDIX 1.

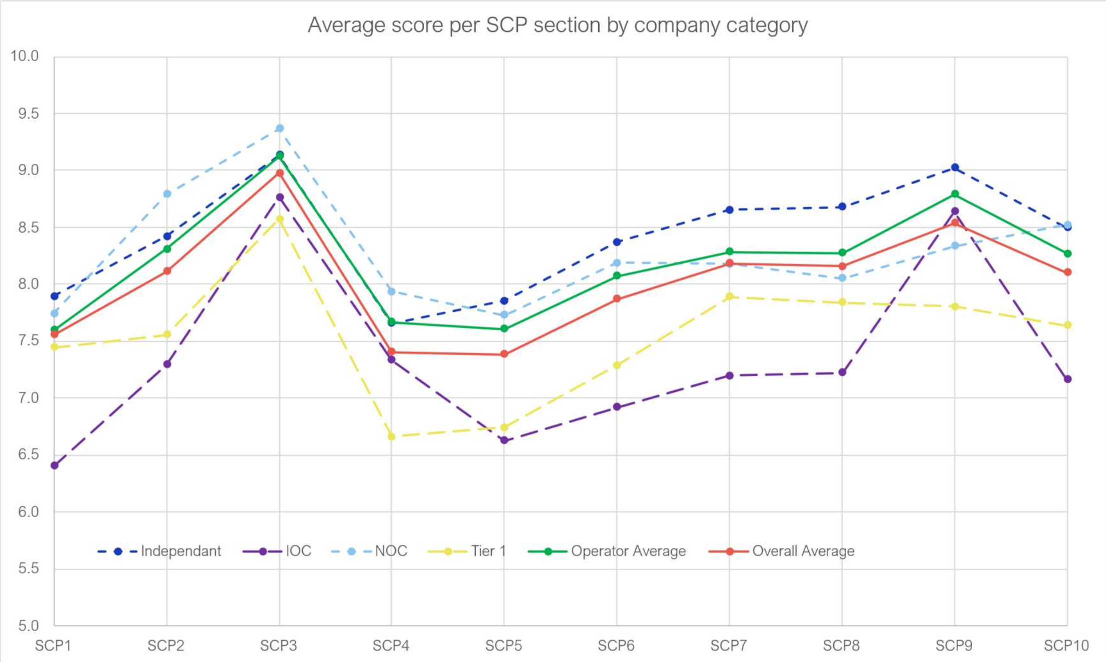


Figure 5.6: Average scores for ranked Supply Chain Principles, averaged by Company Group

Table 5.1: Average scores for ranked section by Group

Groups	Supply Chain Principle 1	Supply Chain Principle 2	Supply Chain Principle 3	Supply Chain Principle 4	Supply Chain Principle 5	Supply Chain Principle 6	Supply Chain Principle 7	Supply Chain Principle 8	Supply Chain Principle 9	Supply Chain Principle 10	Average
International Operator	6.40	7.29	8.77	7.33	6.62	6.92	7.20	7.22	8.64	7.16	7.36
National Operator	7.74	8.79	9.36	7.93	7.73	8.19	8.17	8.05	8.33	8.52	8.28
Independent	7.89	8.42	9.13	7.66	7.85	8.37	8.65	8.68	9.02	8.50	8.42
Tier 1	7.45	7.56	8.57	6.66	6.74	7.29	7.89	7.84	7.81	7.63	7.54
Average across operator groups	7.59	8.31	9.12	7.67	7.61	8.07	8.28	8.27	8.79	8.27	8.20
Overall Average	7.56	8.11	8.98	7.40	7.38	7.87	8.18	8.16	8.53	8.10	8.03

These results clearly show the supply chain areas where all groups are strong and those areas where they are all weaker. The graph also enables comparison across the groups to see where there is difference in performance between the different Operator groups as well as the differences between the Operators and Tier 1 companies.

Supply Chain Principle 3, relating to Competency and Skills was the principle that scored most highly across all companies and categories - this was also the case for both the 2021 and 2023 surveys. SCP 5, related to Tendering and Auditing requirements, scored the least on average, identifying this as the area for greatest improvement. This was closely followed by SCP 4, regarding Visibility of Work, which scored only 0.02 higher than SCP 5 on average.

Figure 5.7 compares the overall average scores for each SCP in both the 2023 and 2025 surveys. While they are generally similar, there is a notable difference for SCP 7 which shows a significant improvement this year, with the overall average score increasing from 6.74 to 8.18. However, it is likely that this difference can be explained by changes to the questions within the SCP 7 section, and how the answers were scored too (see Section 5.10). Another notable difference is that SCP 9 has been scored for the first time in 2025, having not been scored in 2023, this has been made possible by a re-phrasing of the questioning.

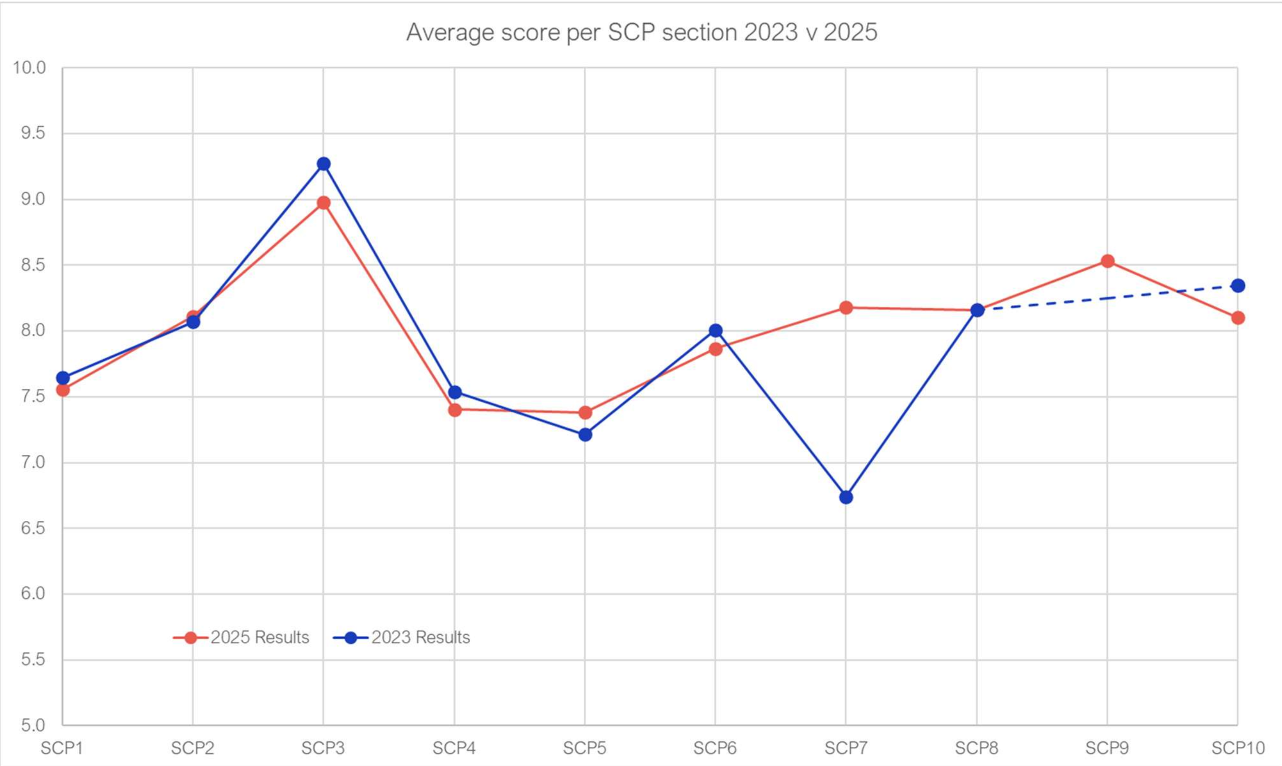


Figure 5.7: Comparison of SCP scores between 2023 and 2025 surveys

On the whole, the most SCP s have witnessed a decrease in score since 2023, with 6 out of 9 SCP s (Only 9 SCP s were scored in 2023) observed to be lower in 2025. The largest reductions being for SCP s 1, 3, and 10. Excluding consideration of SCP 7, which was discussed above, the only other SCP s with an overall improvement were SCP s 2 and 5, with increases of 0.04 and 0.17 respectively. Calculating the overall scores, without SCP 7 or 9 included results in averages separated by a difference of 0.09, for 2025 (7.95) and 2023 (8.04).

5.2. Survey Response Numbers

This year the total number of responses reached 427, a 4% increase over the 2023 survey that received 407 responses. Note that the 2023 survey was open for approximately 13 weeks compared to 15 weeks in 2025. The 2023 survey opened at the end of July, however for 2025, the start date was brought forward to the end of May to avoid the impact of summer holidays.

5.3. Introduction to Individual Supply Chain Principle Results

Throughout the following sections, the results for each Supply Chain Principle are discussed. All charts in the following sections share a colour scheme to aid in results communication. Below is the colour-blind friendly colour scheme used. More positive results or responses were coloured towards the left hand/blue side, with less positive results or responses coloured as orange or red.

5.4. Supply Chain Principle 1 – Risk and Reward

One notable change was made to the questions and scoring in this SCP, with the question: "My organisation has been able to amend commercial contracts with this customer to rebalance risk and reward" being assessed but removed from the company overall scoring. This is not expected to have had a major impact on the scoring, and overall, the results from 2023 and 2025 remain similar.

The majority of respondents indicated that their organisation has been able to amend commercial contracts to rebalance risk and reward, with 35% of respondents saying this happens all the time, and 33% saying it happens most of the time.

Further to this, 78% said Risk and Reward is formally reviewed with the customer during the contract life cycle. 42% of respondents said this happens all the time, while 36% said it happens most of the time.

49% said that potential risks and rewards were objectively discussed and evaluated before contract start and are shared fairly all the time, with 33% saying it happens most of the time.

These results are presented in Figure 5.8 below.

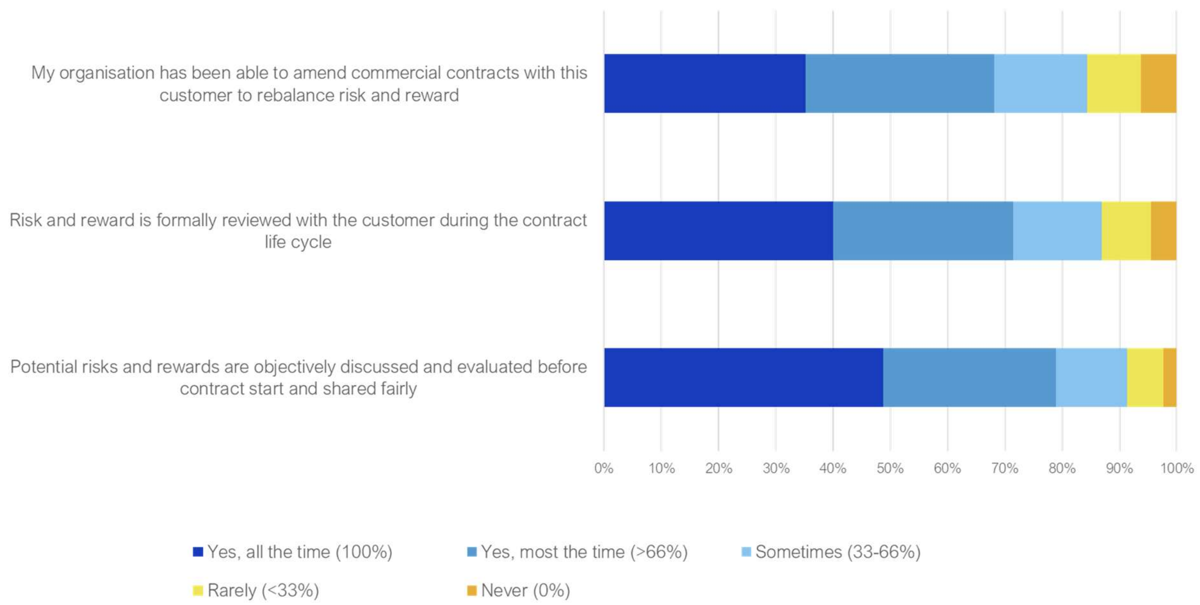


Figure 5.8: Collated Responses to Supply Chain Principle 1 Questions on Risk & Reward

Compared to the 2023 survey, the results are very similar. No particular question stood out as performing worse, a slight reduction in "All the time" and "Most of the time" responses is likely responsible for the reduction in score. The exclusion of one of the previously scored questions will have had a small negative impact on the overall score, however, a general decline in performance across all questions is the main cause of the lower score.

Figure 5.9 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 1. The average score across all companies was 7.56, down slightly from 7.65 in 2023 and below the average SCP score this year (8.03). The average across all operator/developer groups was slightly higher at 7.59. On average, Independent companies performed best with an average SCP score of 7.89, opposed to the International Oil Companies (IOCs) which scored significantly less with an average of 6.40 in this section.

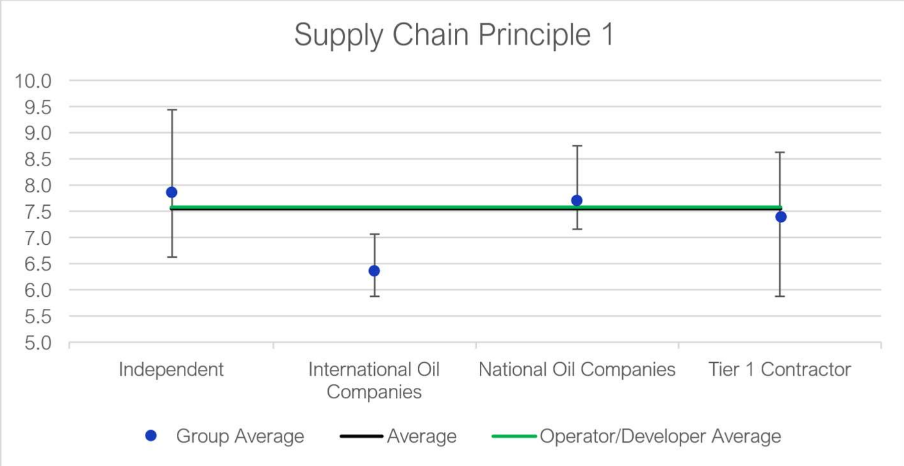


Figure 5.9: Company Group Average Scores for SCP 1: Risk & Reward

Compared to the overall changes in score since 2023, at the individual company level for those who participated in both surveys, there were some significant changes in scoring from 2023 to 2025 (Figure 5.10). Notable positive changes were made by two companies, Company 7 and 6, which experienced increases of 0.8 and 1.8 respectively, with the two worst performing companies seeing greater decreases of 2.2 (Company 19) and 2.3 (Company 30). Most other companies remained within 1 point of their previous score. The graph also shows the average across all companies for SCP 1 for 2023 and 2025 respectively, to highlight the variation between individual companies and the average.

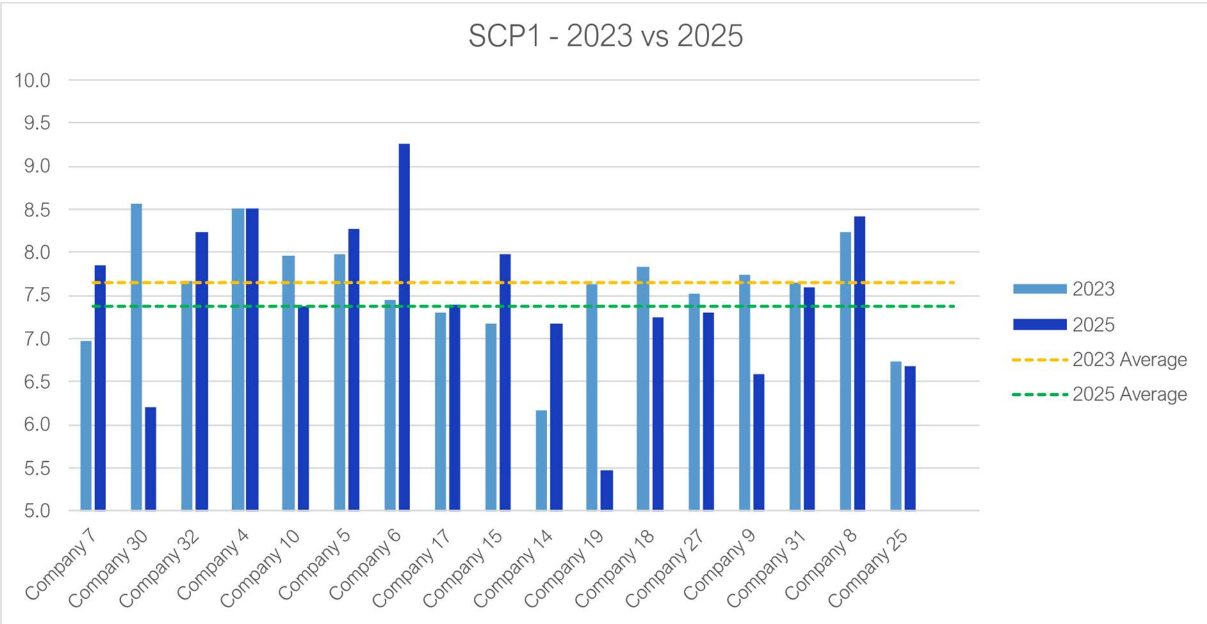


Figure 5.10: Comparison between individual company SCP 1 scores 2023 - 2025

5.4.1. Free Text Responses

61 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"The feedback highlights that risk and reward are usually addressed during tendering and contract negotiations but are rarely revisited once contracts are underway. Many respondents describe clients as approachable, transparent, and supportive, particularly in scope changes and operational discussions. However, there is a consistent perception that risk is often transferred to contractors without adequate reward, with KPI frameworks tending to penalise rather than incentivise. Several comments stress that contracts are typically one-sided at the outset, requiring significant effort to rebalance, and that commercial pressures force contractors to concede margin to retain work. While some note positive engagement and flexibility, others point to slow negotiations, limited opportunities for early collaboration, and a lack of structured mechanisms for periodic review. Overall, respondents call for more balanced, transparent, and proactive approaches—such as mid-term reviews and performance-linked incentives—to ensure fairer sharing of risk and reward across the contract lifecycle."

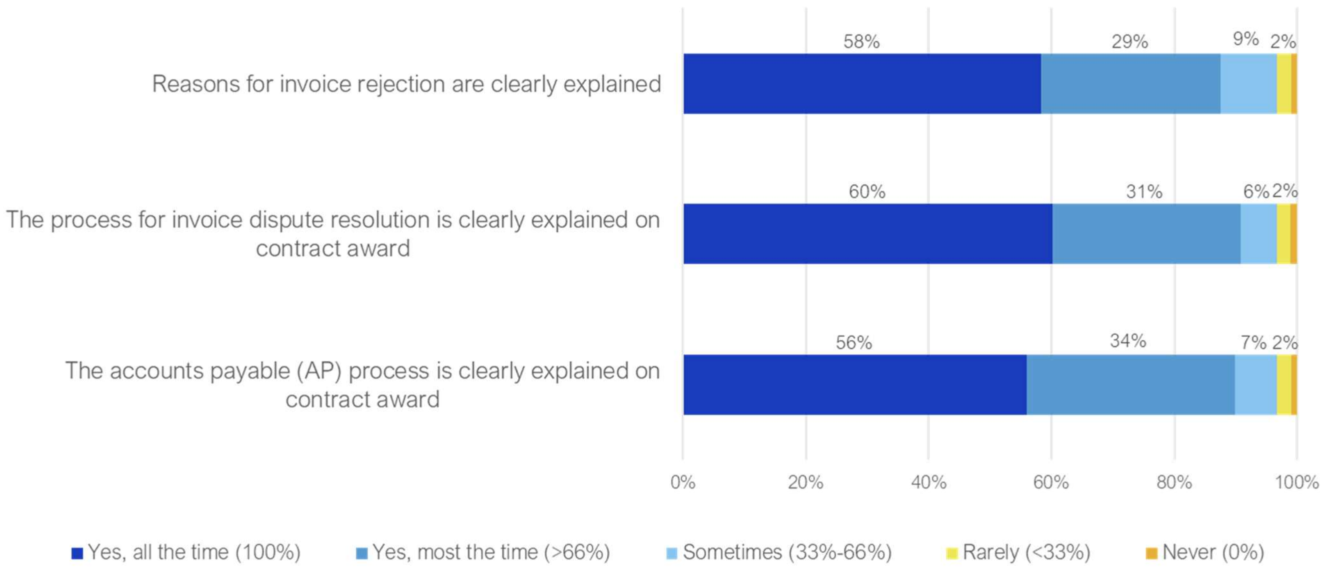
5.5. Supply Chain Principle 2 – Payment Performance & Contract Terms

This section saw some changes from the previous survey with 2 changes being made to the scored questions. One question was moved to the SCP 8 section ("My organisation makes a profitable return with this customer."). In addition, the possible answers and scoring were slightly changed for the question "Which type of contract is the main basis for your commercial relationship?". The scoring was reduced for one of the possible answers, likely leading to an overall reduction in the scores for that question.

Figure 5.11 shows that reasons for invoice rejection were clearly explained, all or most of the time, for 87% of respondents, with 11% saying it was sometimes or rarely explained. Most respondents (91%) agreed that the process for invoice dispute was clearly explained on contract award all or most of the time, 6% said it was explained sometimes, and 2% said it was rarely explained. 90% of respondents agreed that the accounts payable process is always or mostly explained before contract award.

The questions relating to invoice rejection and invoice dispute resolution performed slightly better than in 2023, with the accounts payable process question performing slightly worse.

Figure 5.11: Collated Responses to Supply Chain Principle 2 Questions on Payment Performance



In terms of correctly submitted invoices being paid on time, Figure 5.12 shows that 62% indicated that invoices were paid on time *95-100%* of the time. 23% said they are paid on time between *80-94%* of the time, 7% of respondents said invoices were paid on time *65-79%* and 7% said invoices were paid on time less than half of the time. This is very similar to the 2023 results and does not indicate a notable change in responses.

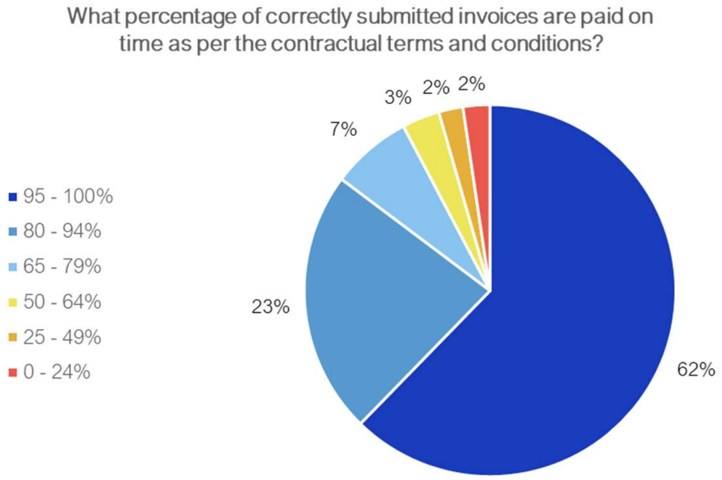


Figure 5.12: Percentage of correctly submitted invoices paid on time

The results relating to the length of standard payment terms are presented in Figure 5.13. This shows that payment terms were 30 days or less for 74% of respondents, and between 31 - 45 days for 15% of respondents. 9% reported payment terms between 46 - 60 days, 2% between 61 - 75 days and 1% exceeding that. The proportion of respondents with payment terms of 76+ days decreased, from 4% in 2023 to 1% in 2025. Improvements were also shown at the other end of the scale with the share of respondents reporting payment terms of 30 days or less increasing significantly from 67% in 2023 to 74% in 2025.

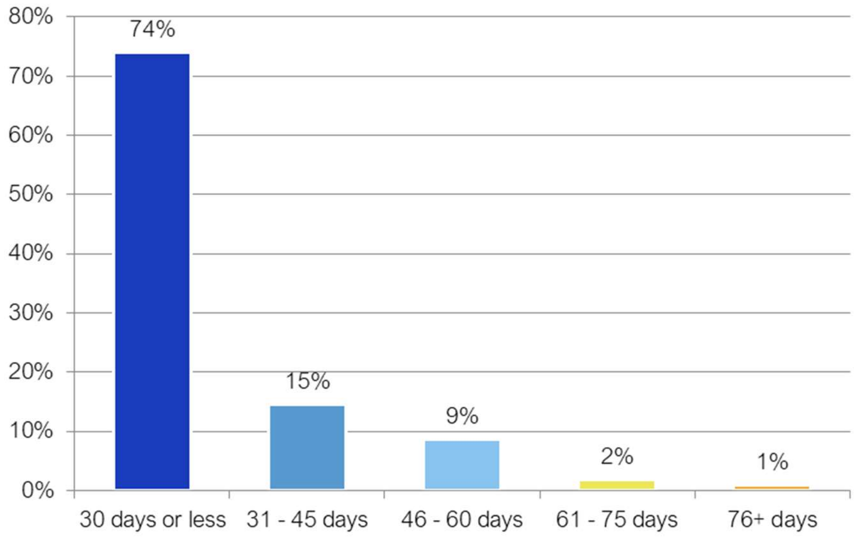


Figure 5.13: Length of standard payment terms

Figure 5.14 shows that the majority of respondents (56%) make use of standard contracts with minimal special conditions, with an additional 13% using standard contracts, with significant special conditions included. The remaining 31% of respondents reported using bespoke or client terms contracts - a reduction from 41% in 2023.

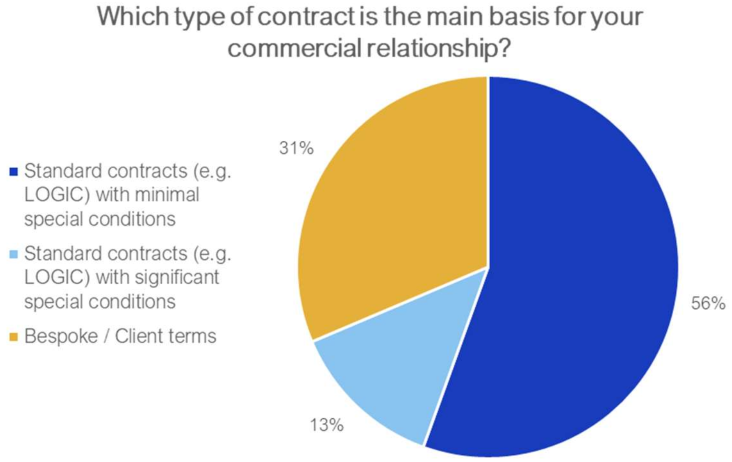


Figure 5.14: Type of contract used as main basis of relationship

Figure 5.15 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 2. NOCs companies scored the highest on average (8.79), along with Independents also above average with a score of 8.42. IOCs performed the worst, with the lowest average (7.29), however, the lowest scoring individual company (6.10) was found within the Tier 1 category. The overall average score for this supply chain principle was 8.11, which is above the average across all supply chain principles at 8.03. The average across all operator/developer groups was 8.31. Compared with the 2023 results, this SCP did not see a significant variance with similar overall score.

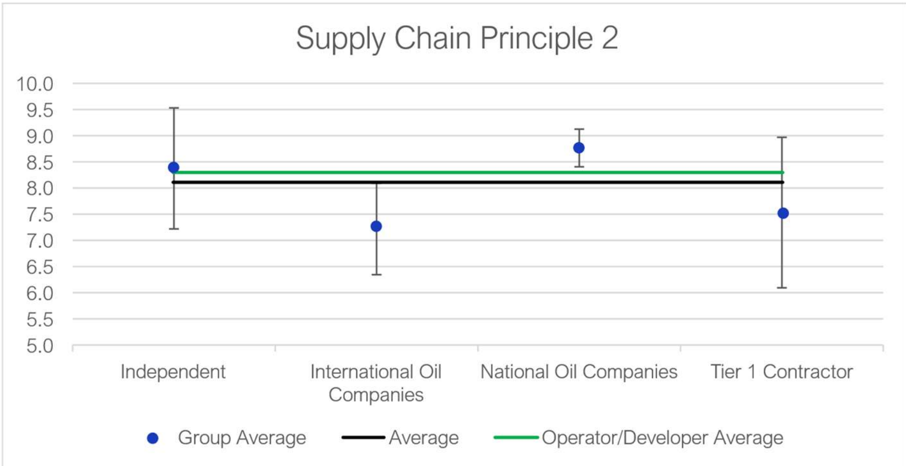


Figure 5.15: Company Group average scores for SCP 2: Payment Performance

For the individual companies who participated in both surveys, most were within 0.5 of their previous year's score, with only 3 companies having differences greater than that (Figure 5.16). Two of those companies, Company 19 & 9, both saw decreases of around 1-1.2 points, while the greatest increase observed was for Company 6 at around 0.7 points. Overall, the change across the years seemed to be minimal as previously discussed above. The graph also shows the average across all companies for SCP 2 for 2023 and 2025 respectively, to highlight the variation between individual companies and the average.

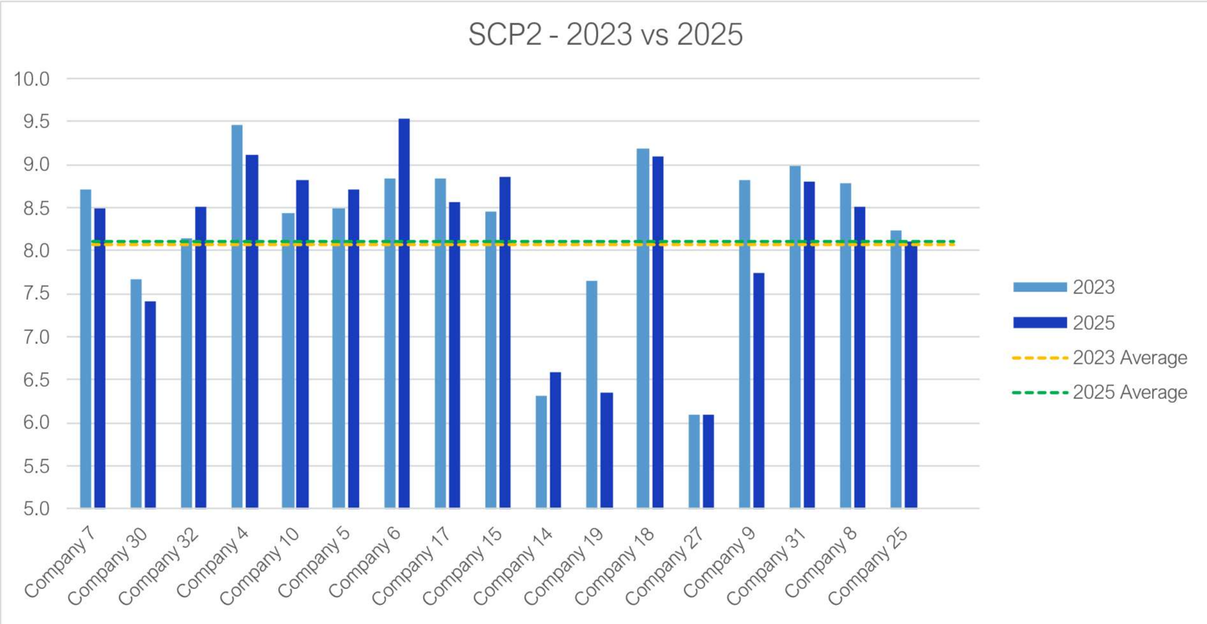


Figure 5.16: Comparison between individual company SCP 2 scores 2023 - 2025

5.5.1. Free Text Responses

49 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Feedback on payment performance is mixed, with many respondents reporting timely payments and efficient processes, while others highlight persistent delays. Positive experiences emphasize strong communication, transparency, and proactive engagement from the client's commercial and accounts payable teams. In these cases, invoices are typically paid within 30 days, sometimes faster, and disputes are resolved quickly.

However, several challenges recur. Delays often stem from slow purchase order issuance, tracker reviews, or the need for manual PO uplifts when projects overrun. These issues can reset payment terms and create unnecessary administrative effort. Some respondents note inconsistent rejection processes, limited explanations for disputes, and extended terms ranging from 35 to over 100 days, which negatively impact cash flow.

External factors such as joint venture arrangements, mergers, and financial reorganisations have also contributed to backlogs. While improvement initiatives are acknowledged, greater consistency, efficiency, and alignment to standard industry terms remain key opportunities."

5.6. Supply Chain Principle 3 – Competency & Skills

No changes were made to the questions or scoring in this section since 2023. Figure 5.17 highlights that the vast majority of respondents (96%) said that the competencies and skills required for the work are clearly defined in a scope of work. An identical proportion to the 2023 survey results.

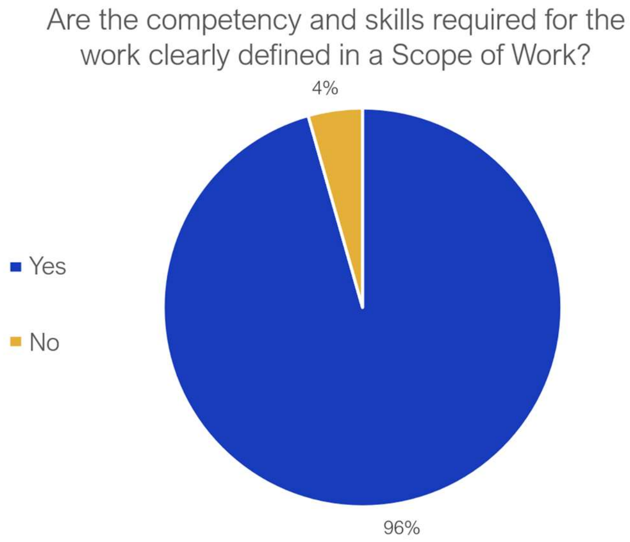


Figure 5.17: Competency and required skills are clearly defined

In 83% of cases, respondents said that the customer required demonstration or evidence of the competency and skills before undertaking the work, as shown in Figure 5.18. A reduction from 89% in 2023to 83% this year.

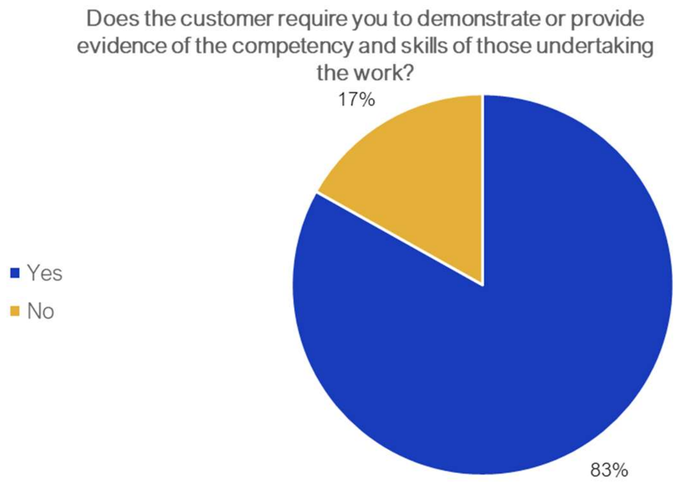


Figure 5.18: Required to demonstrate or provide evidence of competency and skills

Figure 5.19 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 3 relating to competency and skills. This was the highest scored section for every group, with an overall average of 8.98. No significant outliers were present for this section, with all but one company scoring above an 8 (Gold Award). NOCs scored the highest average (9.36), while Tier 1s averaged the lowest (8.57) with the lowest individual score (7.50) also. This indicates that participating companies are typically clear in the competency and skills they require, as well as requiring evidence of those competencies. The average across all operator/developer groups was 9.12. Compared to the 2023 results, this overall score is lower at 8.98, down from 9.27, however it still remains a strong score across all questions and categories.

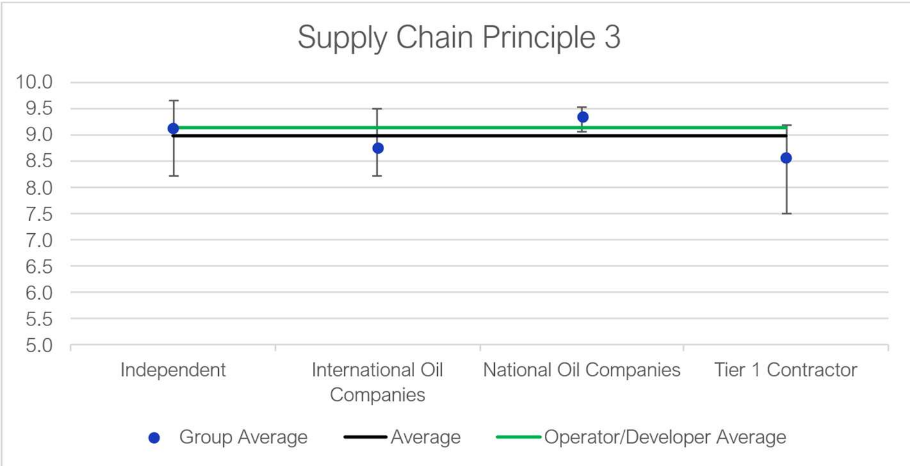


Figure 5.19: Company Group average scores for SCP 3: Competency & Skills

The reduction in scores for this SCP since 2023 is clearly seen for those who participated in both surveys, at the individual company level. In 2023, 5 companies scored a perfect 10 for this SCP, whereas no company achieved that this year (Figure 5.20). In general, more companies had a reduction in their score from 2023, with only a few improving. One company (Company 8) saw a reduction in score of 1.8 points, and another (Company 27) decreased from a perfect score, down to 8.45. The largest single improvement in score was approximately 1.5 points by Company 9. The graph also shows the average across all companies for SCP 3 for 2023 and 2025 respectively.

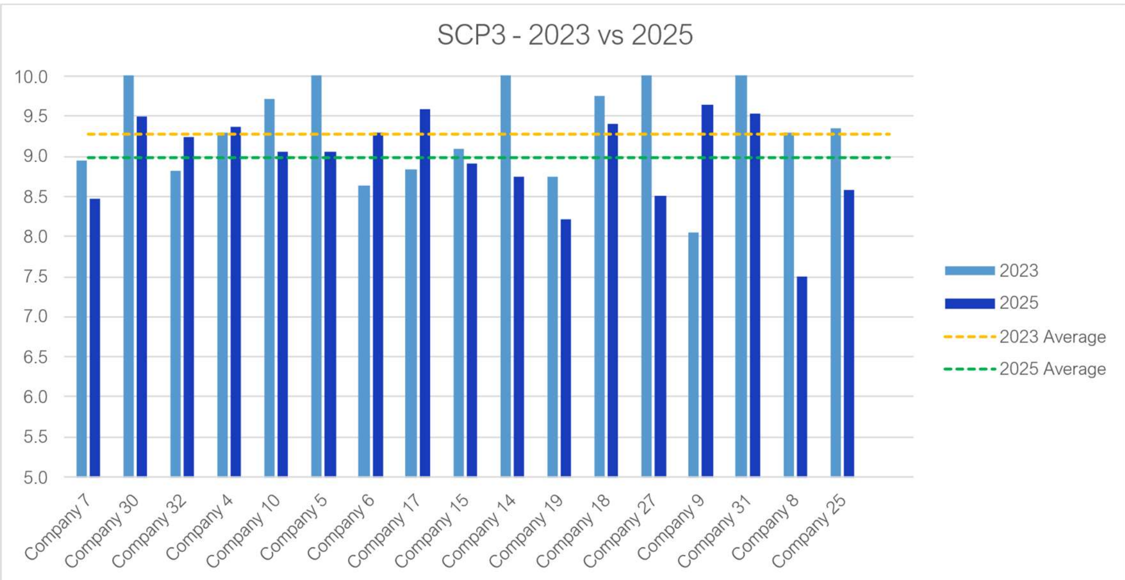


Figure 5.20: Comparison between individual company SCP 3 scores 2023 - 2025

5.6.1. Free Text Responses

35 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

“The comments highlight that competency is consistently embedded in scopes of work, contracts, and client requirements, with evidence often provided through CVs, training records, or audits. Clients are seen as proactive in driving high standards, regularly reviewing skills through meetings, performance reviews, and site visits. A strong emphasis is placed on structured competency management systems that assess skills and knowledge objectively, rather than relying solely on years of experience. Collaboration between clients and contractors is valued, with joint initiatives such as training matrix reviews and new frameworks to standardize offshore workforce competency. While many respondents note clear requirements and supportive processes, some raise concerns about inconsistent or unrealistic demands, such as requests for services outside core expertise or rigid experience thresholds. Overall, competency is viewed as central to delivery assurance, safety, and trust, though maintaining it requires ongoing investment, clarity, and alignment between internal systems and client expectations.”

5.7. Supply Chain Principle 4 – Visibility of Work

Some changes were made to the questions and scoring in this section since the 2023 survey. The question, “Do you regularly receive customer activity forecasts and forwards work plans?”, had the possible answers expanded from just “Yes” or “No” to answers based on the proportion of time that this is experienced. Also, the question, “Have you had a contract cancelled or terminated early by this customer?”, had the previous “Yes” answer updated to now include two options, “Yes, but well explained” or “Yes, but not explained” answer. This update allowed for the removal of follow up question and simplified the survey and subsequent scoring and analysis.

Figure 5.21 shows that for Supply Chain Principle 4, only 1% of respondents have had a contract either cancelled or terminated early by the customer when the reason for cancellation was not explained, with the vast majority (99%) saying that this hadn’t happened to them. In the situations when a contract was terminated or cancelled, the most responded with saying the reason for cancellation was well explained. When this question was asked in 2023, 93% of respondents reported that they had not had a contract cancelled or terminated early, this has decreased to 88% in 2025. Those reporting that the reason for cancellation was not explained remained at 1%, while there was an increase from 6% in 2023 to 11% in 2025, for those experiencing cancelled or terminated contracts where the reason for cancellation was well explained.

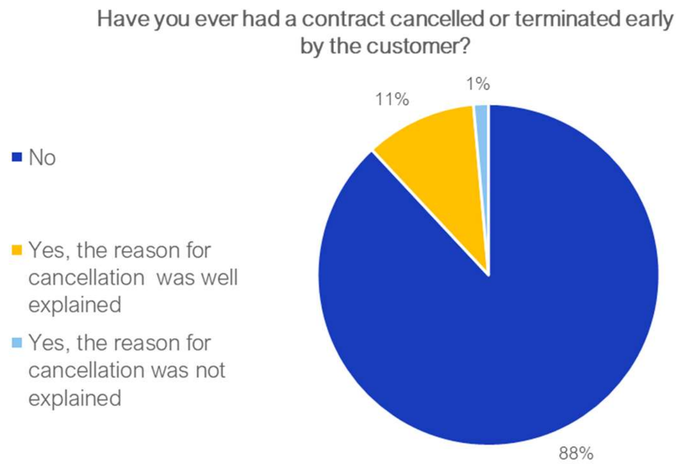


Figure 5.21: Contracts cancelled or terminated early by the customer

Customer activity forecasts and forward work plans were regularly received by 59% of respondents all or most of the time (Figure 5.22), and 19% said they rarely or never receive them. Of those forecasts received, 62% were perceived to be reliable more than *80%* of the time, 19% were reliable *65-79%* of the time, and 19% were reliable less than *65%* of the time (Figure 5.23). Comparing with 2023 results, respondents appear to be receiving activity forecasts more than they were before, however, due to the change in possible answers a direct comparison is not possible. When comparing the reliability of these forecasts; this seems to have decreased relative to the 2023 results.

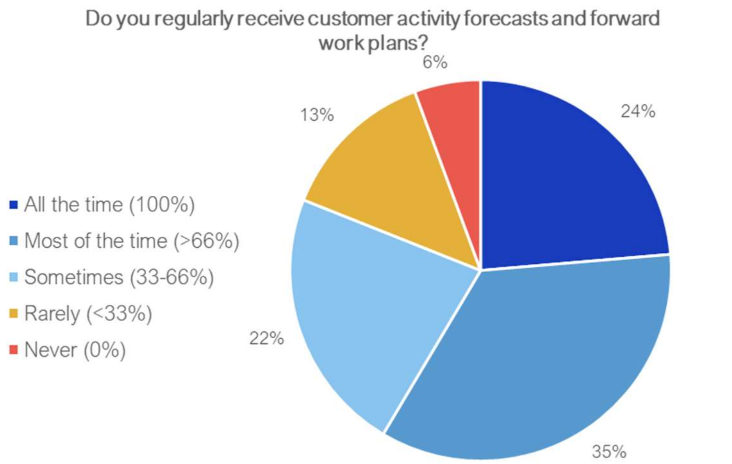


Figure 5.22: Do you regularly receive customer activity forecasts and forward plans from customer?

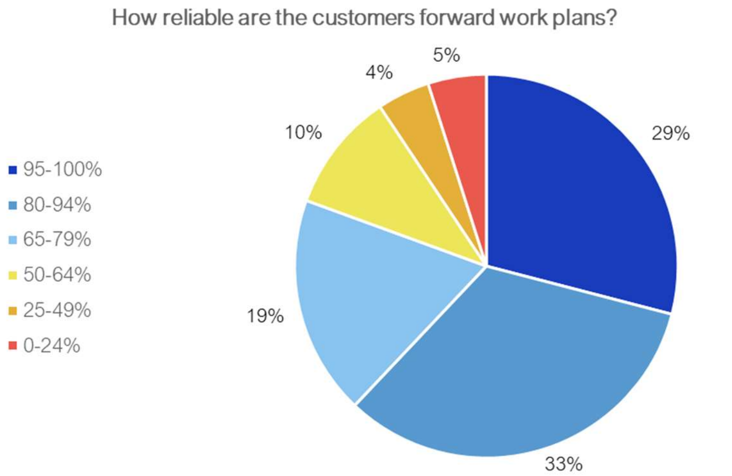


Figure 5.23: Forward plan reliability

The average score across all groups for Supply Chain Principle 4 relating to visibility of work was slightly lower than the overall average at 7.40. Tier 1s performed the worst with an average score of 6.66, including the lowest individual score of 5.47, as seen in Figure 5.24. The average across all operator/developer groups was 7.67. Compared to 2023, there has been a slight reduction in the average from 7.54 to 7.40 this year. This may be due to the change to the possible answers for the question, “Do you regularly receive customer activity forecasts and forward work plans?”, and as a result, the way this question was scored too.

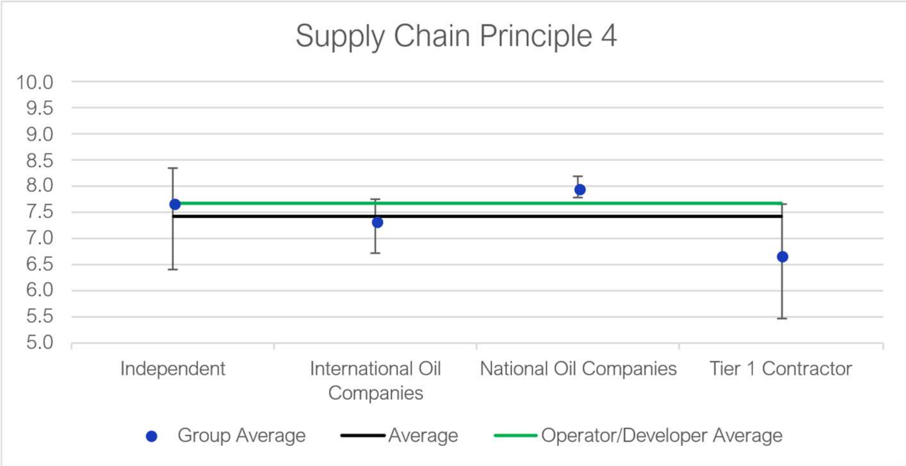


Figure 5.24: Company Group average scores for SCP 4: Contract Cancellations

At the individual company level, the majority of companies who participated in both surveys have stayed within 1 point of their previous score (Figure 5.25). However, some notable changes are as follows: Company 7 saw an increase from 6.3 to 7.9 (1.6 points), Company 6 saw an increase from 5.9 to 7.8 (1.9 points), Company 15 saw an increase from 6.4 to 8.1 (1.7 points), and Company 8 saw a significant decrease from 9.0 to 7.2 (1.8 points). Most companies saw a slight decrease, as evident from the decrease in the overall average score. Due to the changes made to the questions in this section, it cannot be determined whether this is due to the changes, or due to declining performance from the companies. The graph also shows the average across all companies for SCP 4 for 2023 and 2025 respectively.

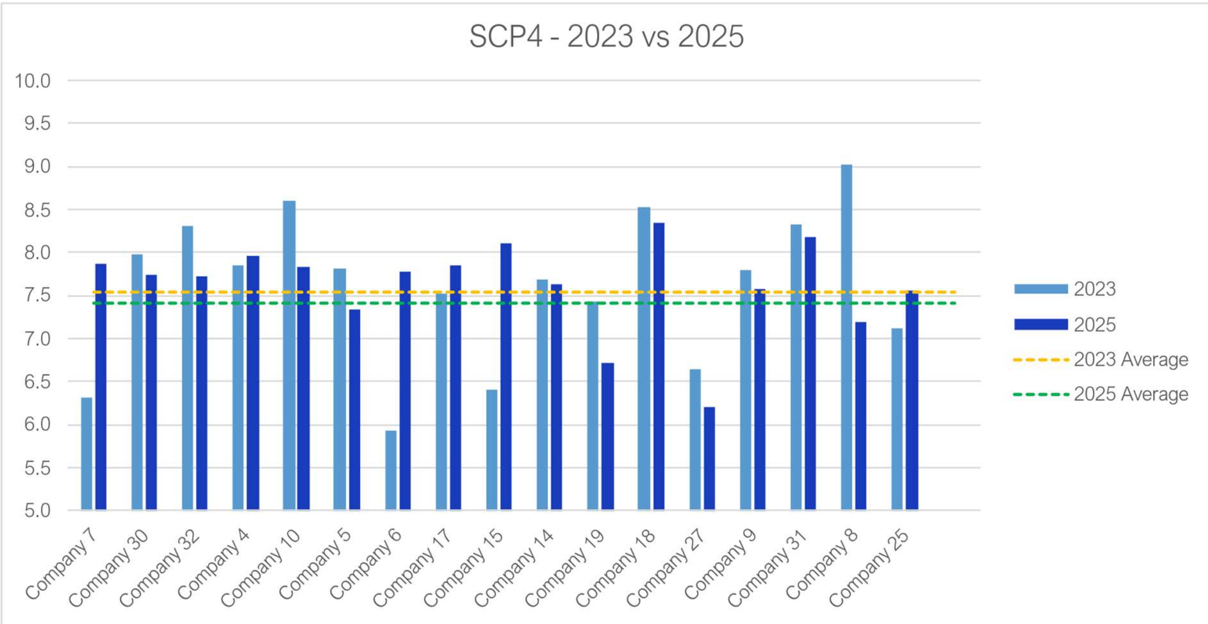


Figure 5.25: Comparison between individual company SCP 4 scores 2023 - 2025

5.7.1. Free Text Responses

50 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

“Overall, respondents highlight mixed experiences with visibility of work. Many note that communication is generally good, with regular updates through calls, workshops, and account management meetings. Some praise the client’s openness, proactive engagement, and clear short-term planning, which supports operational readiness. However, recurring concerns include inconsistent long-term visibility, late issuance of scopes, and reliance on informal or ad-hoc updates. Several comments stress that forecasts often lack sufficient detail for accurate planning, while others point to last-minute shutdown plans, cancelled scopes, or shifting requirements that undermine confidence. Broader market uncertainty and external factors, such as offshore logistics or unplanned outages, further complicate forward planning. Respondents call for earlier contractor engagement, greater transparency around delays or cancellations, and longer-term (2–3 year) lookaheads to enable investment, innovation, and resource optimisation. While strong relationships and open dialogue exist, more consistent, reliable, and detailed forecasting would significantly strengthen collaboration.”

5.8. Supply Chain Principle 5 – Tendering & Auditing Requirements

No changes were made to the questions or scoring of this section since the 2023 survey.

Most respondents (85%) felt that the tendering process was efficient all or most of the time, with only 5% suggesting it is rarely or never efficient, as shown in Figure 5.26.

The lower graph in Figure 5.26 shows that the vast majority (87%) of respondents said that there were opportunities to engage with the customer at the pre-tender stage, which helped inform what was being tendered for most or all the time. For 8% of the respondents, this happened sometimes, while for the remaining 4%, this was rarely or never the case. For both questions, the results are within 1-2% of the 2023 results.

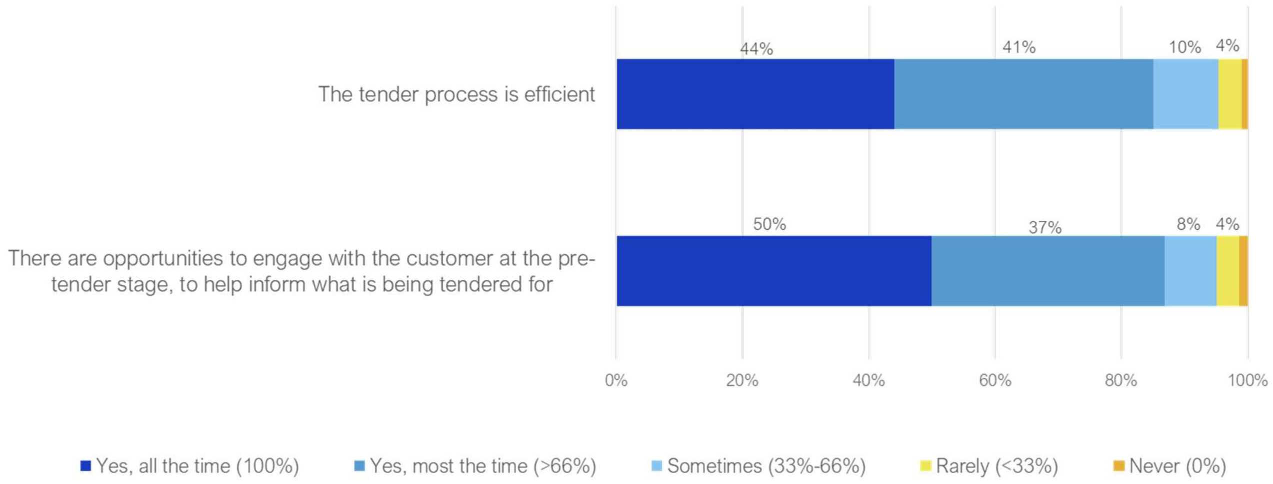


Figure 5.26: Analysis of responses related to the tender process

For 60% of respondents, the customer does not request information that is already available, as shown in Figure 5.27. An improvement on 50% in 2023.

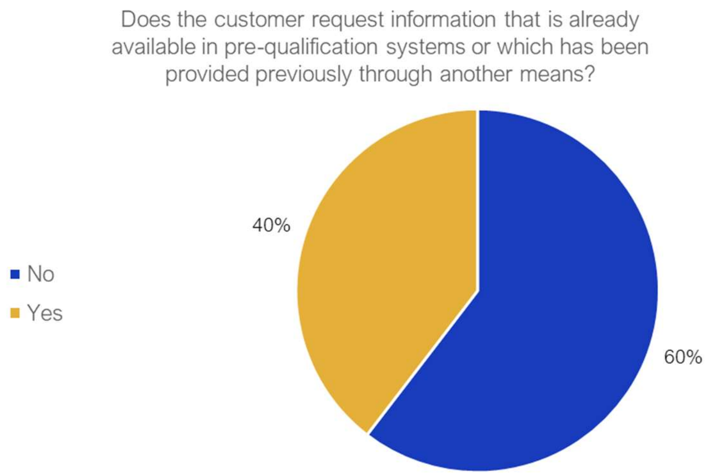


Figure 5.27: Customer requests previously shared information

Less than half of respondents (42%) reported that their customer conducted repetitive tendering for similar scopes of work (Figure 5.28). This was a modest reduction from 45% in 2023.

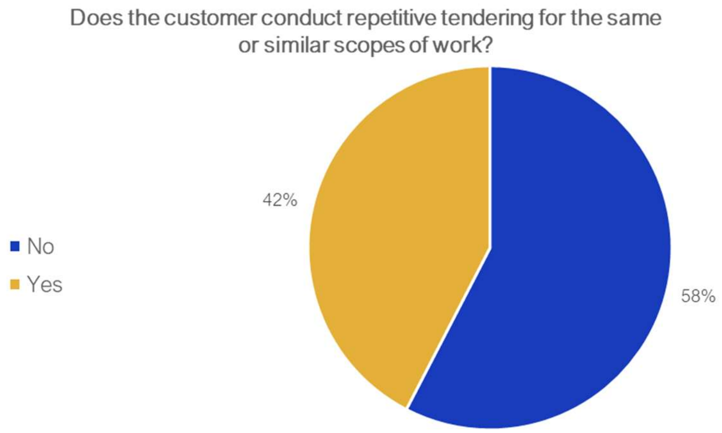


Figure 5.28: Customer conducts repetitive tendering

A vast majority (96%) of respondents said that the audit requirements from customers were suitable and efficient (Figure 5.29). A slight improvement from 2023 results (94%).

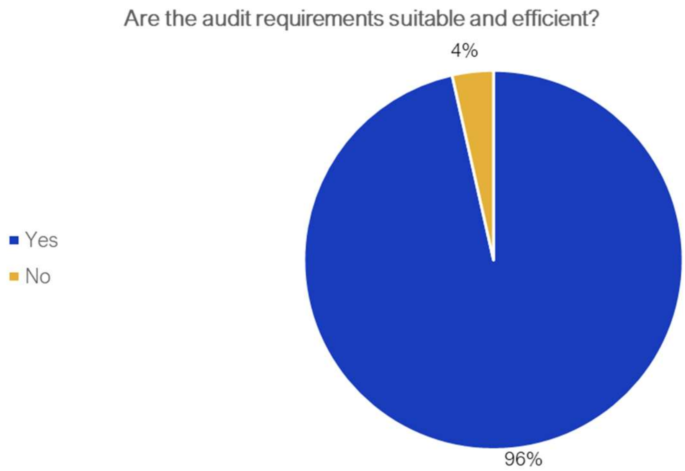


Figure 5.29: Audits requirements are suitable and efficient

79% of responses indicated a use of industry pre-qualification systems (Figure 5.30). SEQual was the greatest, with 44% of the responses, this was followed by Achilles at 35%. A further 4% were for other systems and 17% said no pre-qualification systems were used. Compared to the 2023 results, there appears to be a decrease in the overall use of pre-qualification systems. Some of the other pre-qualification organisations listed by respondents are provided below along with the number of responses:

- Magnet – 7 responses
- ISNETworld/ISN – 8 responses
- ISO – 1 response
- UVBD – 1 response

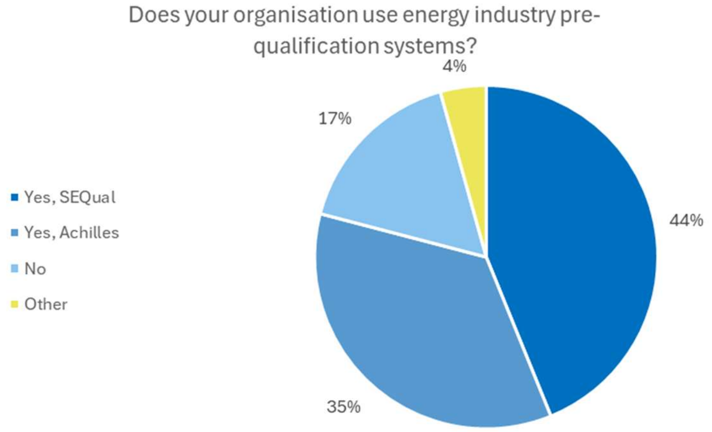


Figure 5.30: Use of pre-qualification systems

Adherence to Supply Chain Principle 5 (Tendering and Audit Requirements) with an average score of 7.38 was below the average score across all principles (8.03). IOCs performed the worst on average (6.62), closely followed by Tier 1s (6.74) (See Figure 5.31). Both Independents and NOCs performed above average with NOCs having the best performing company and best performing "lowest" scorer. The average across all operator/developer groups was 7.61.

Performance compared to the 2023 was improved, with overall average score increasing from 7.20 to 7.38, resulting from small improvements across all questions.

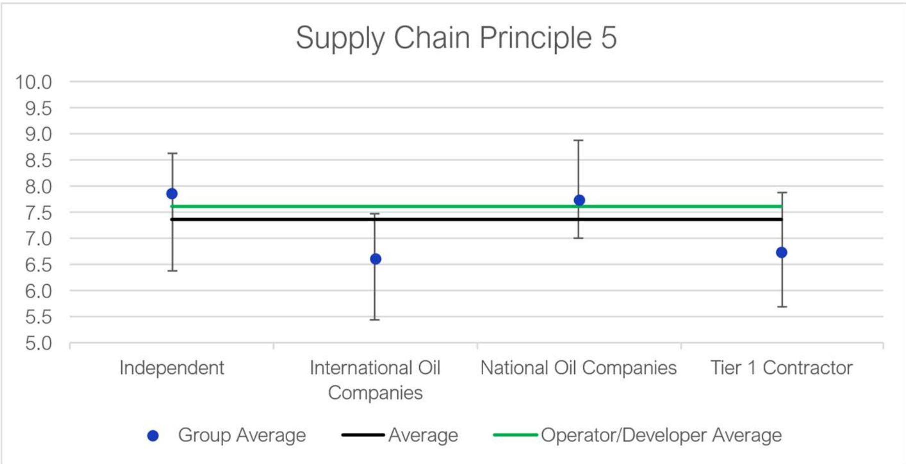


Figure 5.31: Company Group average scores for SCP 5: Tendering & Auditing Requirements

The improvement in this section can be seen at the individual company level as well, with 10 out of the 17 companies who participated in both surveys, improving on their score in 2023 (Figure 5.32). The largest score increases came from Companies 7, 5 and 14, with improvements of 1.5, 1.1 and 1.7 points respectively. The company with the largest decrease in score was Company 19, with a reduction from 6.8 to 5.4 (1.4 points). The graph also shows the average across all companies for SCP 5 for 2023 and 2025 respectively. No changes were made to the questions or scoring of this section, so the overall improvement in scores does indicate some improvement across the industry for this SCP.

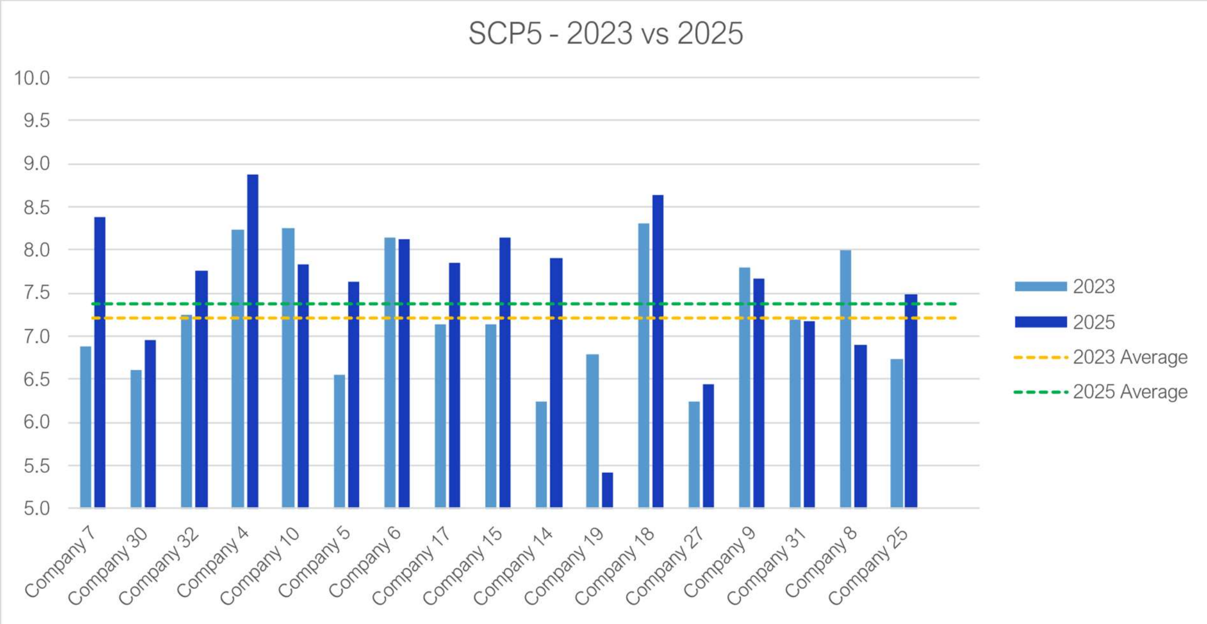


Figure 5.32: Comparison between individual company SCP 5 scores 2023 - 2025

5.8.1. Free Text Responses

23 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Overall, suppliers view the tendering process as generally efficient, with structured frameworks and opportunities for pre-tender engagement supporting clarity and professionalism. Many highlight positive communication, responsiveness to queries, and constructive feedback, which fosters confidence in the client's integrity. However, recurring concerns include duplication of information requests, particularly where data already exists in SEQual or Achilles, and audits that revisit areas already covered by ISO or DNV certifications. This creates unnecessary administrative burden and diverts resources from value-adding work. Some suppliers note that SEQual itself can be difficult to navigate, with limited support available. Calls are made for greater standardization, risk-based auditing, and consistency across operators to reduce duplication. Additional challenges include compressed or unclear timescales, limited pre-tender communication, and protracted contract negotiations. While most find requirements proportionate and balanced, others describe audits as overly detailed or tenders as resource-intensive, suggesting scope for streamlining and efficiency gains."

5.9. Supply Chain Principle 6 – Innovation

No changes were made to the questions or scoring of this section since the 2023 survey.

Maximising the full potential by adding value through innovation was possible for the majority (71%) of responders. 16% said that the customer only focused on costs and 13% responded that they didn't know (see Figure 5.33). Innovation during the tendering process was encouraged some or all the time in 96% of cases, with suppliers responding that they were actively encouraged, some (10%), most (36%) or all (50%), of the time, to submit innovative approaches and new ideas which may even be outside the work scopes of the tender, as shown in Figure 5.34.

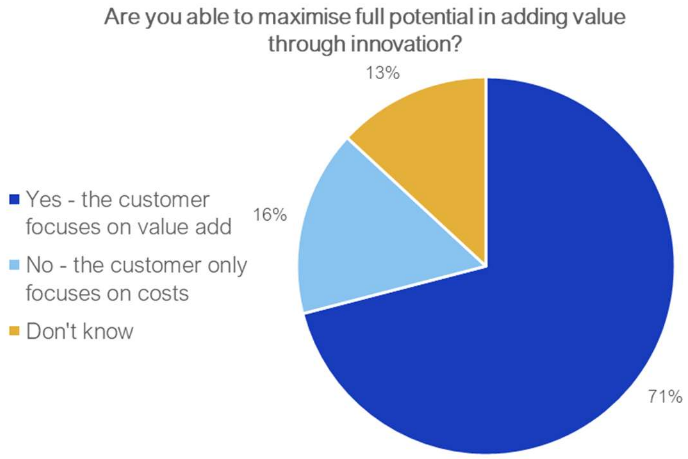


Figure 5.33: Maximising full potential in adding value through innovation

Constructive feedback on the outcome of bids was received all the time for 45% of respondents, most of the time for 34%, 15% said sometimes and 6% responded rarely or never. This is shown in Figure 5.34.

In response to whether they had engaged with the customer to discuss work scopes outside of the tender process which encourage innovative approaches, 47% said all the time, another 35% said most of the time, 11% said sometimes and 8% said rarely or never. This is shown in Figure 5.34.

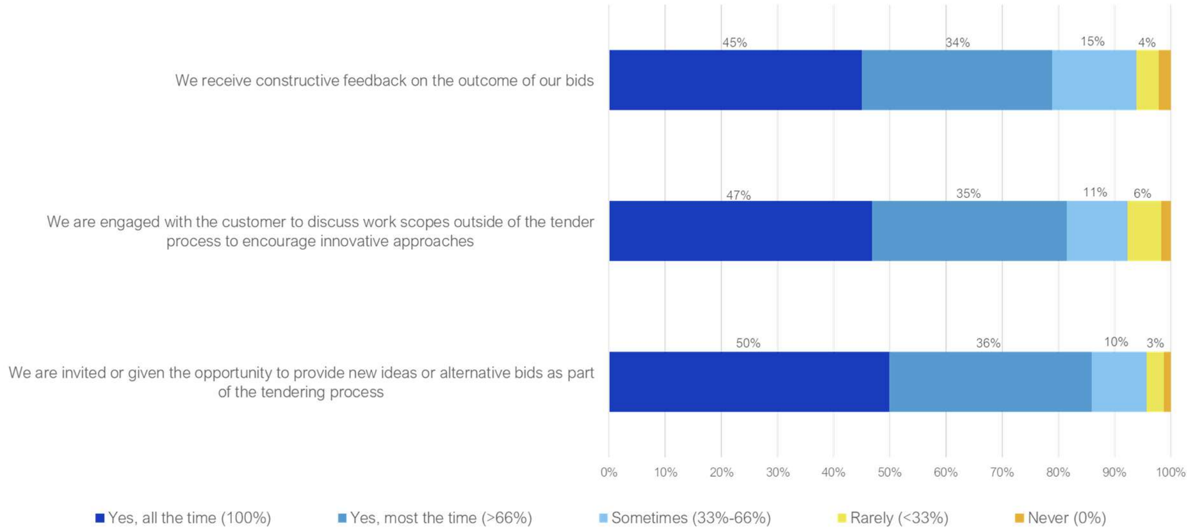


Figure 5.34: Further responses related to engagement with customer for innovation

Adherence to Supply Chain Principle 6 (Innovation), with an average of 7.87, was slightly below the average score across all principles (8.03), and the score achieved in 2023 (8.03). The average across all operator/developer groups was 8.07. Figure 5.35 shows that Independents were above average for the principle at 8.37 and outperformed all other Groups, with both the highest average and individual score (9.20). IOCs and Tier 1s scored below the collective average achieving 6.92 and 7.29 respectively. Tier 1s did have the largest spread across its companies with the lowest performing individual company and also one of the best performing. NOCs consistently performed better than average with most companies scoring above the overall average.

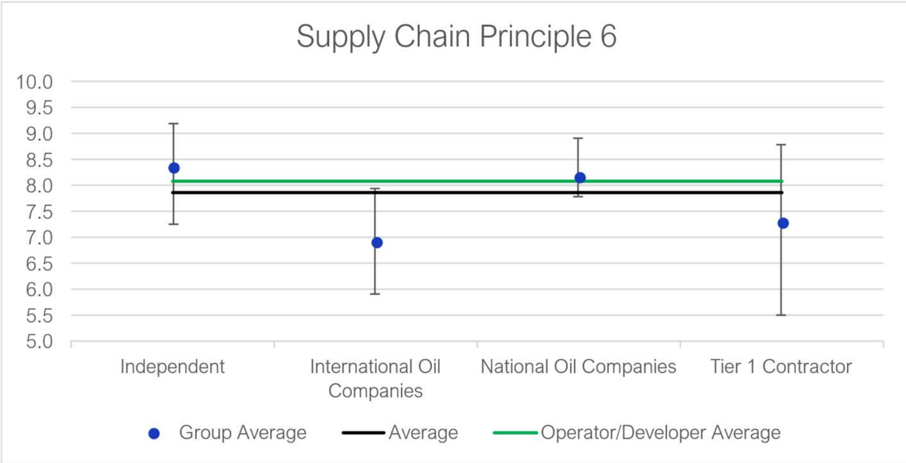


Figure 5.35: Company Group average scores for SCP 6: Innovation

At the company level, only 7 out of the 17 companies who participated in both surveys increased their scores from 2023. There was an overall decrease in performance as shown by the overall scores (Figure 5.36). No changes were made to this section's questions or the scoring, therefore, the overall decrease in score is likely due to a decrease in performance for this SCP. The graph also shows the average across all companies for SCP 6 for 2023 and 2025 respectively. Some notable individual changes include Company 6 which increased from 6.6 to 9.2 (2.6 points), and company 19 decreased from 7.9 to 5.9 (2 points).

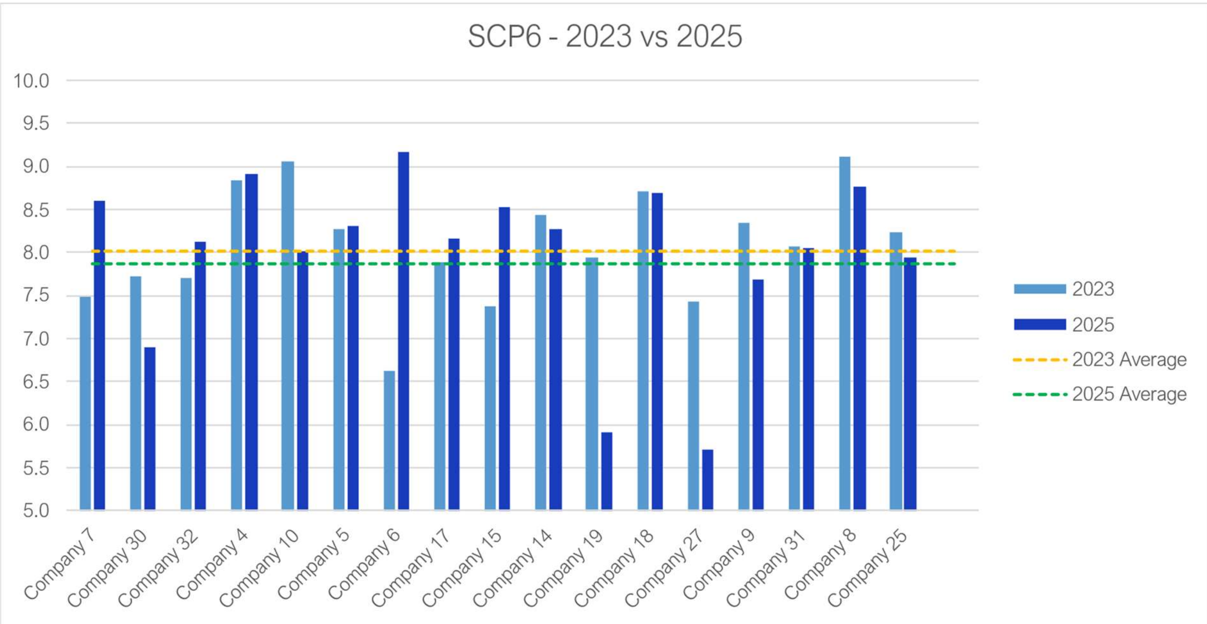


Figure 5.36: Comparison between individual company SCP 6 scores 2023 - 2025

5.9.1. Free Text Responses

43 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Overall, the client demonstrates a mixed but evolving stance toward innovation. Many suppliers note genuine openness to alternative approaches, particularly during early engagement and scope discussions, with constructive feedback often provided. Positive examples include collaboration on shared facilities, consolidation of work scopes, and joint development projects that enhance efficiency and value. However, cost remains the dominant factor in most tenders, with "lowest cost, technically competent" bids frequently outweighing value-added proposals. This creates frustration when innovative solutions are overlooked or delayed due to budget constraints, short-term cost control, or limited visibility of forward planning. Some suppliers highlight inconsistent feedback, late orders, and rigid processes that hinder innovation. Others stress that opportunities exist to strengthen cross-party collaboration, embed total value considerations (sustainability, risk reduction, long-term efficiency), and create space for trials of new approaches. Overall, the environment is cautiously supportive but still heavily cost-driven."

5.10. Supply Chain Principle 7 – Alternative Bids

Only one question was modified in this section of the survey. For the question, “Have any alternative bids/proposals submitted by you to this customer been successful?” (Figure 5.39), the previous “No” response has been replaced by the following additional answers, “No, the reason for rejection was well explained” and “No, the reason for rejection was not well explained”. The scoring for this question also changed, with the “No, the reason for rejection was well explained” being scored 10, while the alternative answer is scored as 0, which was the same score for a “No” response in the previous survey. This additional qualification to the possible answers has resulted in a significant increase in the scores across this section.

Figure 5.37 shows that alternative bids were considered during tender processes (37%) most of the time, or (42%) all the time, 15% said sometimes and 5% responded rarely or never. These responses are similar in proportion to the previous 2023 survey results.

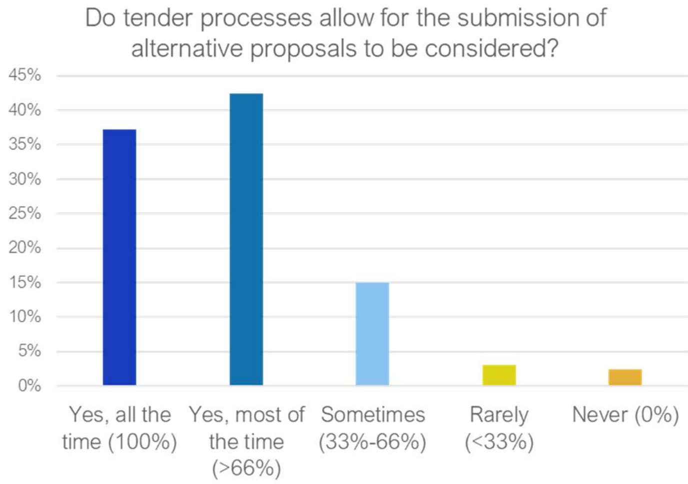


Figure 5.37: Tender process allows submission of alternative proposals

18% of respondents did say they have been asked sometimes to price against an alternative solution by another bidder (see Figure 5.38). This is a small decrease compared to the 2023 responses, where 19% reported that they were asked this.

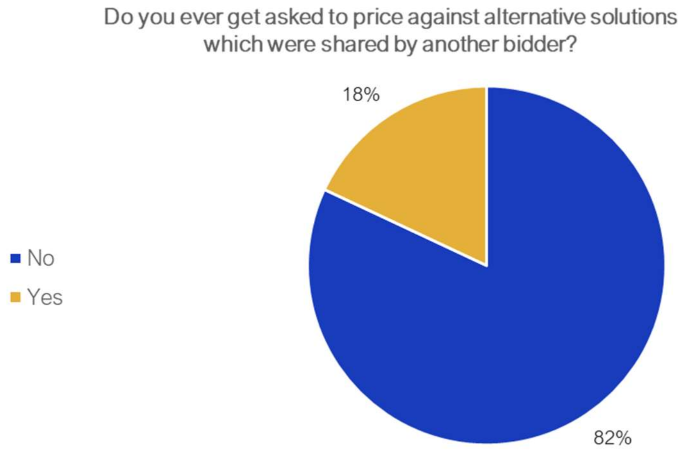


Figure 5.38: Do you ever get asked to price against alternative solutions?

When asked whether any alternative bids or proposals had been successful in the past 12 months, 49% responded “Yes”. This is up from 45% in 2023. Of those that had no successful alternative bids (6%), none said the reason for rejection was well explained.

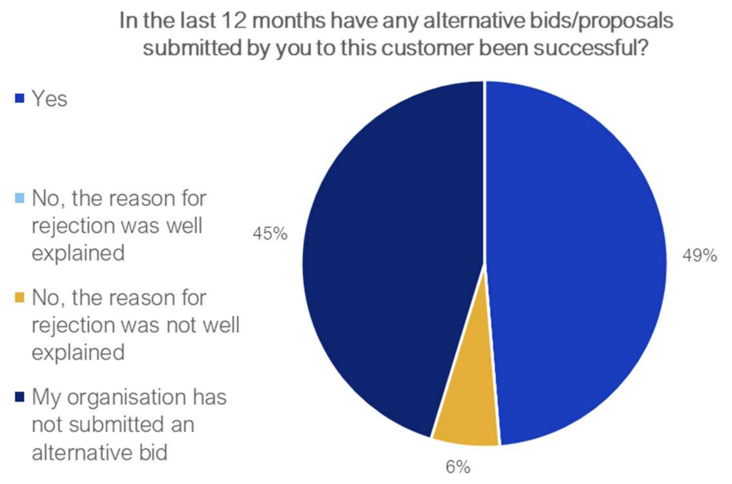


Figure 5.39: Successful Alternative bids in past 12 months

Figure 5.40 shows the mean, highest and lowest values for each company category for SCP 7. It reveals a similar pattern to most of the SCP s before, with Independents and NOCs performing better than the overall average of 8.18, while IOCs and Tier 1s performing worse than the overall average. The average across all operator/developer groups was 8.28. NOCs had a tight spread, indicating some consistency in their practices related to this SCP. Independents performed significantly better than the average achieving a score 8.65, while all IOCs scored lower than the average. Overall performance for this SCP (8.18) is higher than average (8.03), and significantly higher scoring than the 2023 results (6.75). The reason for the increase in the score from 2023, is likely due to the inclusion of the answers to the question, “My organisation has not submitted an alternative bid” shown in Figure 5.39. This answer is now counted as a “Don’t Know” response and therefore does not count towards the overall score, whereas in 2023, respondents who may have wanted to answer “N/A” or “Don’t know” only had the option of “No”, which was scored as 0, and as a result, would bring down the overall average.

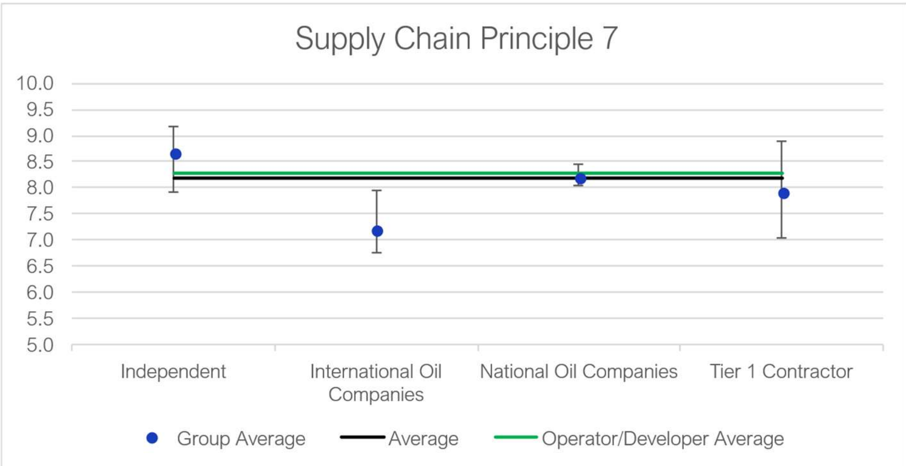


Figure 5.40: Company Group average scores for SCP 7: Alternative Bids

Due to the change made to the alternative bid question in this section, most companies who participated in both surveys, showed a large improvement across the board when comparing the 2025 scores to 2023. The graph also shows the average across all companies for SCP 7 for 2023 and 2025 respectively. The apparent improvement in performance is likely attributable to the changes made to the one question and scoring. This statement is further reinforced when considering the 2 questions unchanged from 2023, where no significant differences were seen, as discussed above.

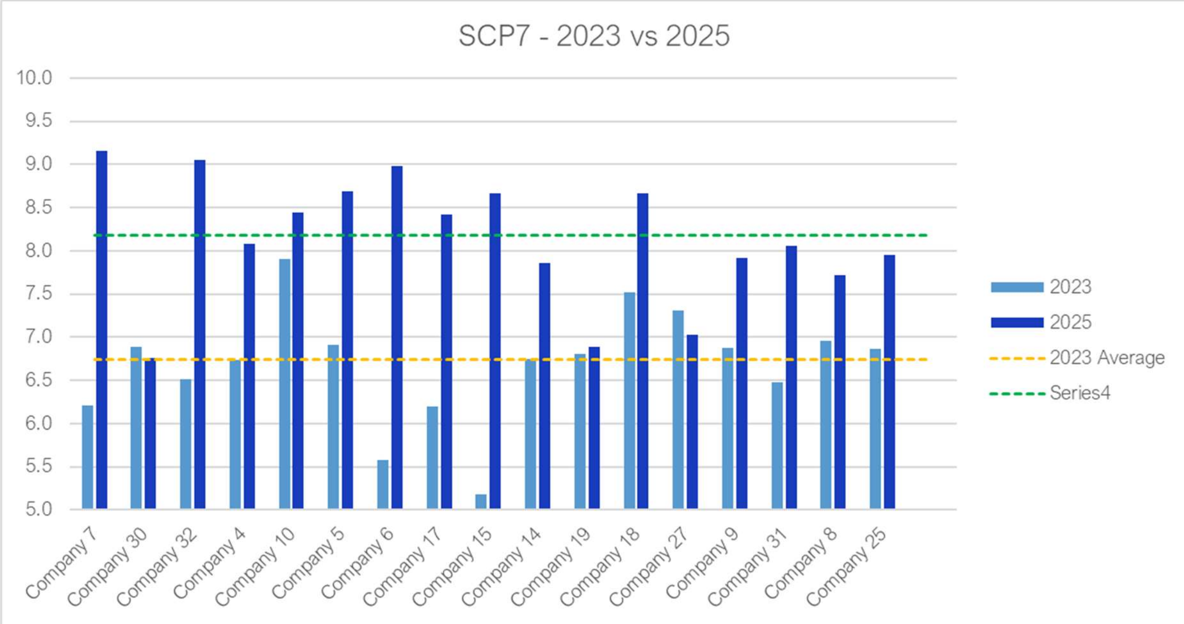


Figure 5.41: Comparison between individual company SCP 7 scores 2023 - 2025

5.10.1. Free Text Responses

23 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Alternative bids are generally viewed as valuable opportunities to demonstrate innovation, efficiency, and cost savings, though their use varies widely across contracts. Many respondents note that clients are open and flexible, appreciating collaborative discussions that can refine scope, improve cost representation, or enhance performance. Successful examples include accepted engineering alternatives that reduced cost and schedule, or direct awards based on bespoke solutions. However, challenges are common: preparing compliant and alternative bids simultaneously is resource-intensive, evaluation criteria for alternates are often unclear, and risk-averse clients may avoid adopting new products or approaches despite potential benefits. Some highlight that performance often outweighs cost in client priorities, while others stress that minor scope changes are more likely to be accepted than disruptive proposals. Overall, while alternative bids can unlock value, their impact is limited by evaluation transparency, client risk appetite, and the significant effort required to prepare them."

5.11. Supply Chain Principle 8 – Low-ball Bidding

The SCP 8 section had a few updates to questions and scoring. These are, addition of "My organisation makes a profitable return with this customer" moved from SCP 2, as well as the question, "Has a contract required renegotiating due to unsustainable pricing?" being removed from the company scoring altogether.

Low ball bidding was experienced by 11% of respondents and the remaining 89% said they had not been encouraged by the customer to submit unsustainable pricing or rates (see Figure 5.42). This is an increase from 2023 when only 7% responded "Yes" to this question. However, 22% of responses indicated that a contract had to be re-negotiated due to unsustainable pricing (see Figure 5.43), showing a decrease in this since 2023 when 29% answered "Yes" to this question.

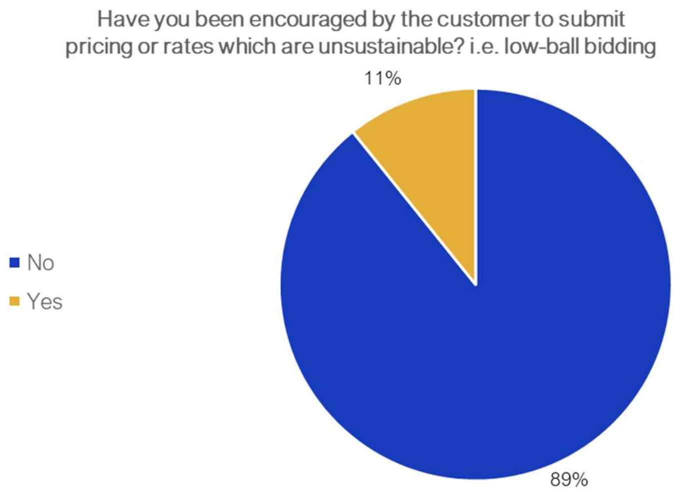


Figure 5.42: Encouraged by customer to submit Low-ball bid

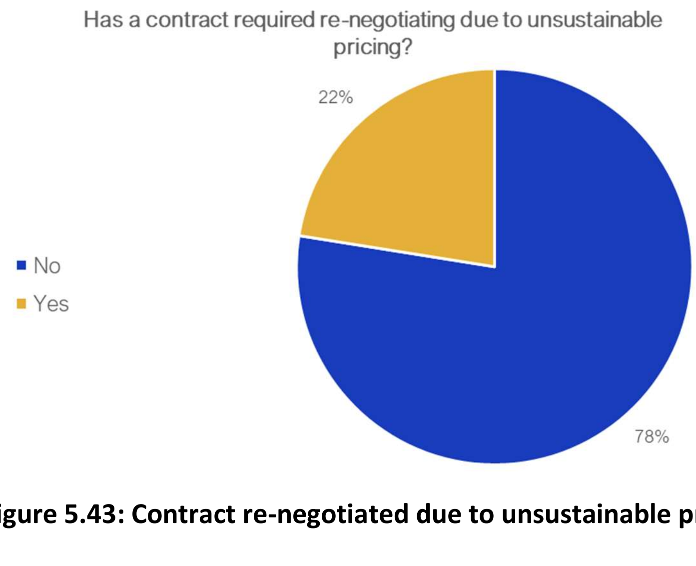


Figure 5.43: Contract re-negotiated due to unsustainable pricing

This year, the question, "My organisation makes a profitable return with this customer", was moved from SCP 2 to SCP 8. 34% of respondents said they make a profitable return all the time, 46% answered most of the time, 16% answered sometimes. 4% indicated they rarely or never make a profitable return with their customer. Overall, this represents a poorer performance compared to the 2023 survey, with a 9% decrease in "all of the time," a 2% increase in "most of the time," a 4% increase in "sometimes," a 2% increase in "rarely," and "never" rising from 0% to 1% in 2025.

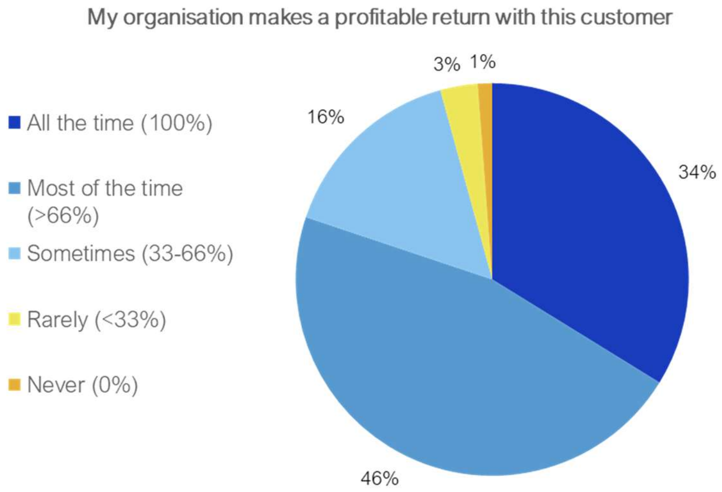


Figure 5.44: Make profitable return with this customer

Adherence to Supply Chain Principle 8 (Low-ball Bidding) was slightly greater than the overall average SCP score at 8.16 compared to 8.03 overall. The average across all operator/developer groups was slightly higher at 8.27. Again, IOCs were seen to perform the worst, with an average score of 7.22 and the lowest individual score of 5.22. Independents performed best with an average score of 8.68 and highest individual score of 9.70. The overall performance this year was slightly lower when compared to the 8.24 achieved in 2023. The change in question answers seems to indicate a reduction in contract re-negotiation and a slight increase in low-ball bidding encouragement. Also, a slight reduction in the proportion of suppliers able to make a profitable return. These changes are not drastic, which is reflected in the similar score to 2023.

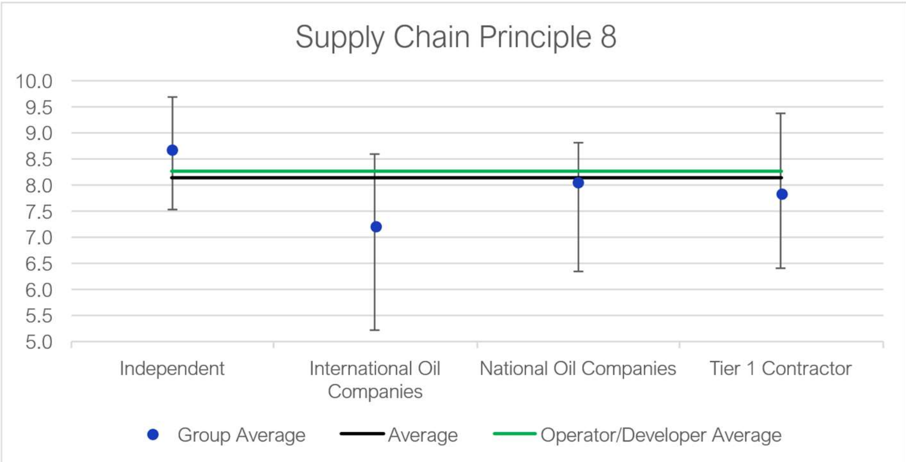


Figure 5.45: Company Group average scores for SCP 8: Low-ball Bidding

The difference in scoring between 2023 and 2025 for those who participated in both surveys, may in part be due to the removal of the question, “Has a contract required re-negotiating due to unsustainable pricing?” from the scoring, however, both of the remaining scored questions have seen a decrease in performance. From the individual company score comparison, most companies remained close to their previous scores, with only a couple of significant changes. Company 19 saw the largest change, a decrease from 7.1 to 4.6 (2.5 points). The graph also shows the average across all companies for SCP 8 for 2023 and 2025 respectively.

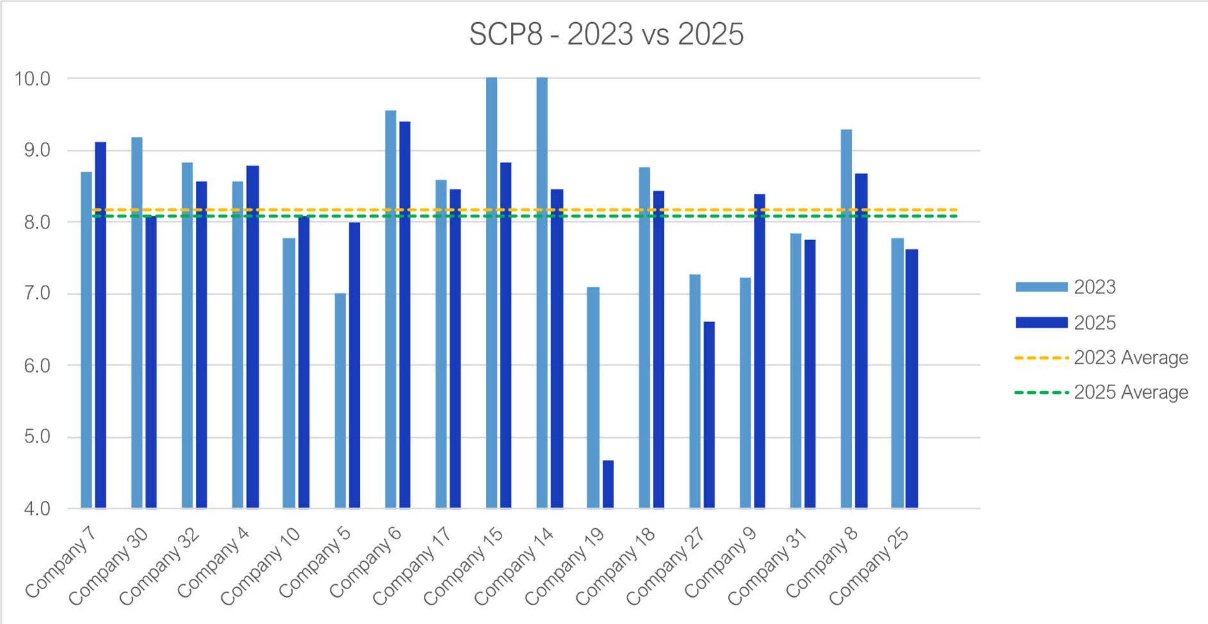


Figure 5.46: Comparison between individual company SCP 8 scores 2023 - 2025

5.11.1. Free Text Responses

36 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Most respondents emphasise that clients generally avoid encouraging low-ball bidding, with many describing commercial discussions as fair, pragmatic, and supportive of sustainable pricing. Long-term framework agreements and mechanisms for inflation-linked adjustments are common, though fixing rates for extended periods has sometimes constrained flexibility and profitability. Several suppliers noted that renegotiations were necessary due to rising material, labour, or legislative costs, particularly during and after COVID-19. While some contracts began with unsustainably low rates, constructive reviews have since improved balance. However, competitive market pressures and certain suppliers' low-ball practices continue to create challenges, risking service quality and long-term value. Respondents stressed the importance of transparency, realistic margins, and incentivised KPIs to retain skilled staff and invest in equipment. Overall, clients are viewed as fair and value-focused, but sustainability requires clear evaluation criteria, regular rate reviews, and a continued emphasis on total value rather than lowest cost."

5.12. Supply Chain Principle 9 – Rate Review Mechanisms

This SCP 9 was not scored in previous years, therefore, there are no comparisons to be made in terms of scoring. Of the 4 unscored questions in the 2023, 3 have been removed, leaving 1 that is comparable with the 2023 survey.

Figure 5.47 shows the proportion of respondents who have contracts with clear rate review mechanisms that are supported and recognised. The majority (88%) responded “Yes” to this question, a significant increase from 2023 when only 57% responded Yes. This year the “Don’t know” response is not available so results from each year are not completely comparable, but it appears that there is some improvement.

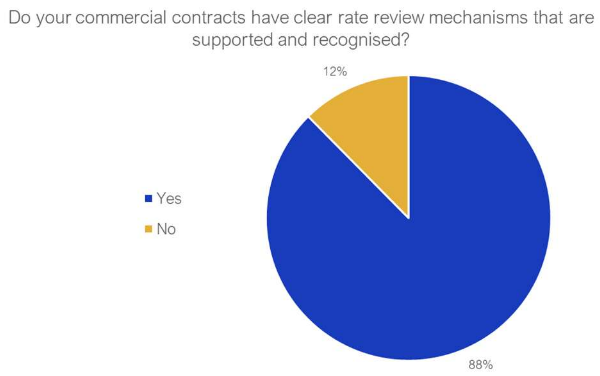


Figure 5.47: Rate Review Mechanisms

SCP 9 was the 2nd best scoring SCP with an average of 8.53, compared to the overall average of 8.03. Independents and IOCs both performed above the average, while NOCs and Tier 1s performed below average. The average across all operator/developer groups was 8.79. Tier 1s had a large spread between highest and lowest performance with a maximum of 10.00 and a minimum of 5.00. As this section was scored using only 1 question, Figure 5.48 shows the difference in answers between the 4 categories.

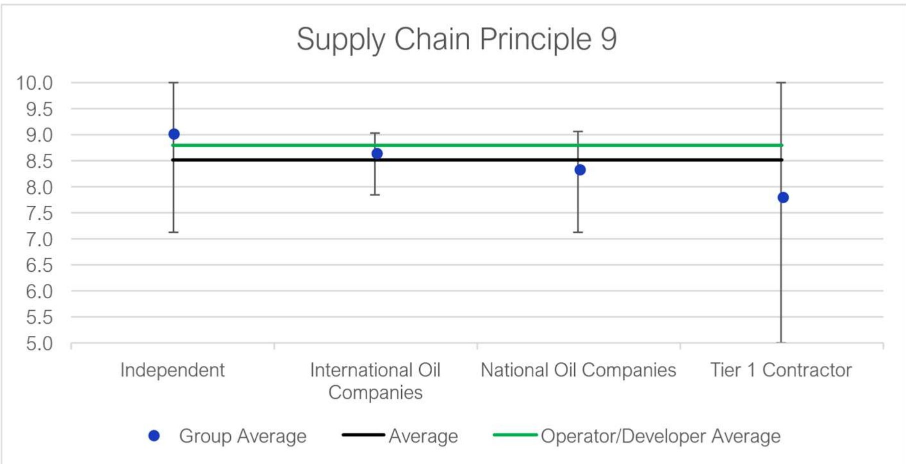


Figure 5.48: Company Group average scores for SCP 9: Rate Review Mechanisms

5.12.1. Free Text Responses

40 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Most respondents highlight that rate review mechanisms are common in contracts, often linked to indices such as CPI, RPI, or bespoke formulas. While some clients are open, pragmatic, and transparent in applying reviews, many suppliers report challenges: reviews are delayed, inconsistently applied, or heavily weighted in the client's favour. Fixed rates over long periods, sometimes three to five years, are seen as misaligned with inflation, cost of living, and sector-specific pressures, particularly in oil and gas. Even when mechanisms exist, clients frequently resist uplifts, demand cost reductions, or insist on additional savings, leading to margin erosion. Several comments call for industry-wide standards (e.g., CPIH) and more flexible, index-linked frameworks to ensure fairness and sustainability. Others note overly complex or outdated indices, protracted negotiations, and the burden placed on suppliers to initiate reviews. Overall, respondents stress the need for transparent, consistent, and proactive mechanisms to maintain balance and service quality."

5.13. Supply Chain Principle 10 – Dispute Resolution

The following question was added to the section and included within the scoring, "Do you receive constructive feedback from your customer?". This question scored the worst relative to the other scored questions in this section, and this resulted in a lower overall score for SCP 10 compared to the previous year.

Most respondents (82%) indicated they had never had to escalate disputes to the MD level before finding a resolution, as shown in Figure 5.49. This result is identical to the 2023 survey.

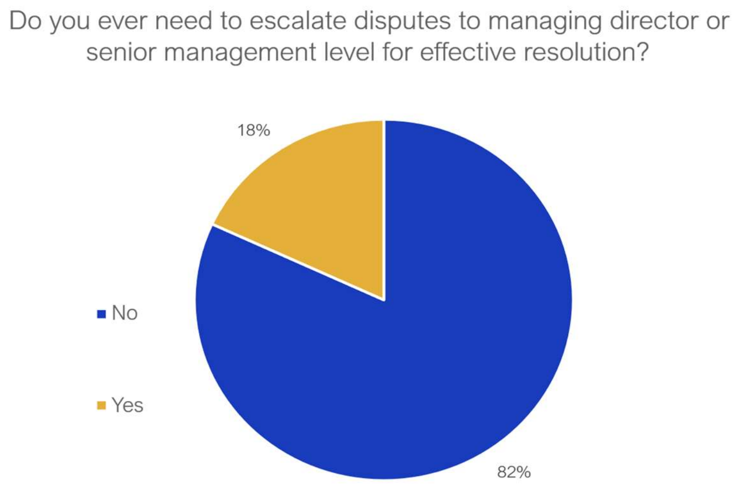


Figure 5.49: Disputes escalated to management level for resolution

In response to the new question, 82% of respondents said that they receive constructive feedback from the customer either all or most of the time, while 13% answered some of the time and 6% answered either rarely or never.

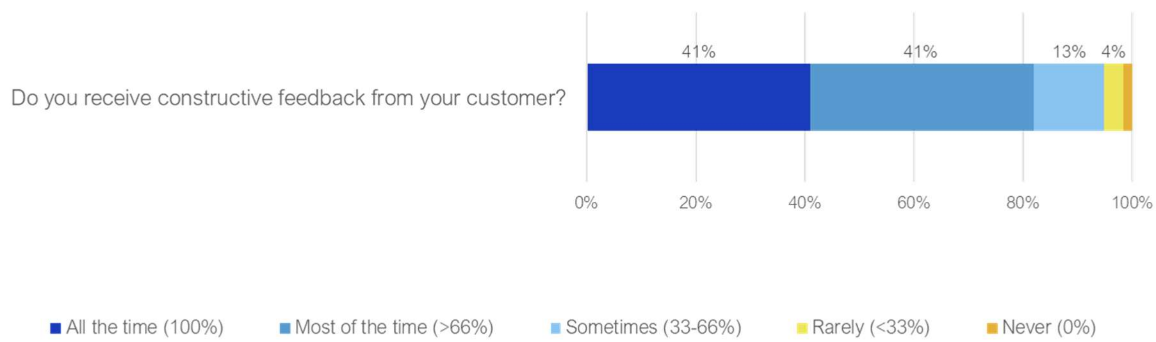


Figure 5.50**: Constructive feedback from customer**

Adherence to Supply Chain Principle 10 (Dispute escalation) was above the overall average at 8.10, with the average across all operator/developer groups at 8.27. Most IOCs performed below average, with an average score of 7.16, and the lowest individual score of 5.36. Tier 1s performed poorly with an average score of 7.63, which was also below the overall average. The lowest individual score within the Tier 1 category was 5.50.

Comparing with the 2023 results, scoring was slightly lower at 8.10 compared to 8.41 previously, however, with the additional question this year, the results are not directly comparable.

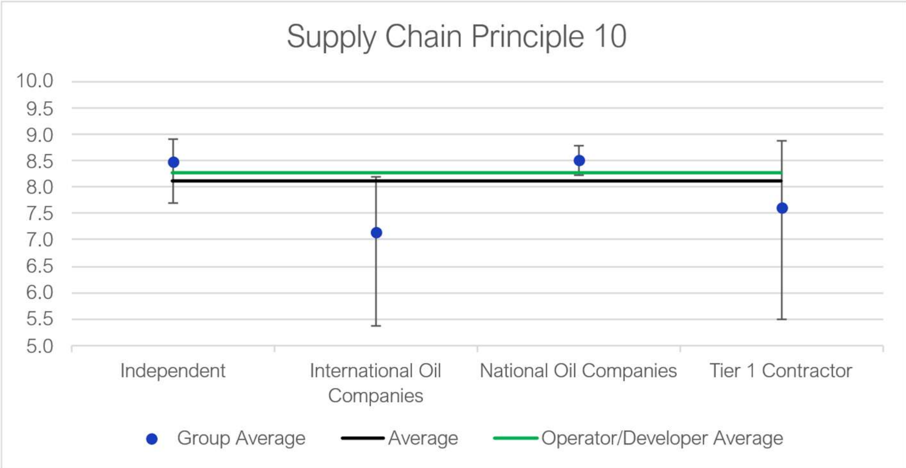
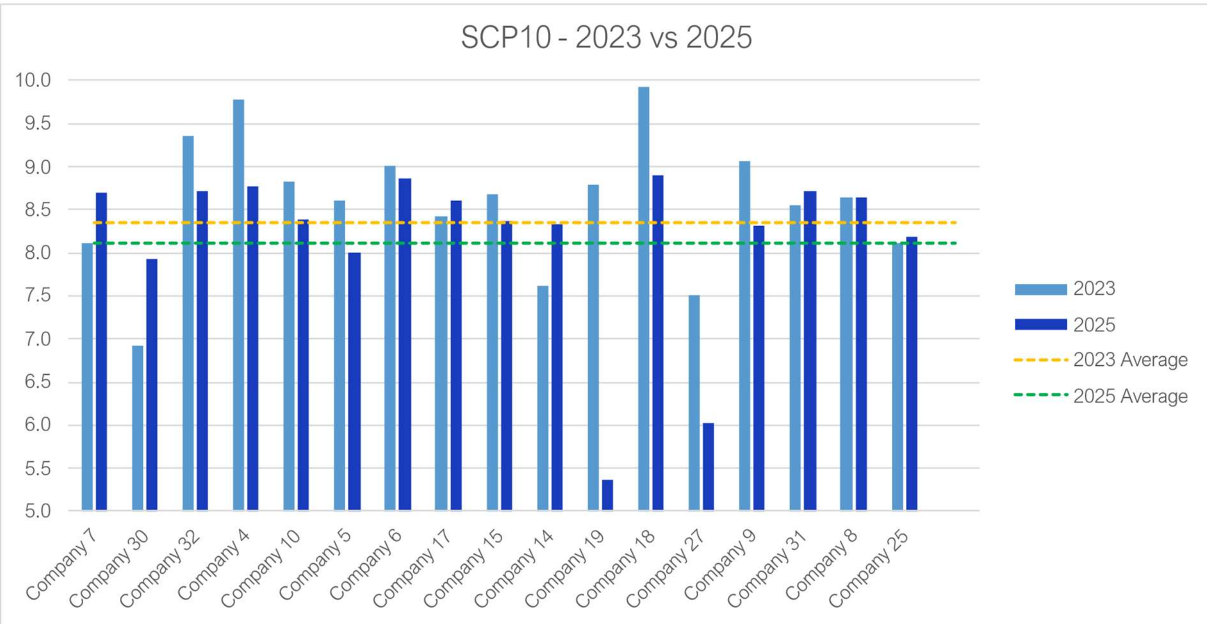


Figure 5.51: Company Group average scores for SCP 10: Dispute Resolution

At the individual company level, the overall lowering of the SCP score can also be seen, with only 6 out of the 17 companies who participated in both surveys, improving on their 2023 score. The most significant change being Company 19 which decreased from 8.8 to 5.4 (3.4 points). This was the largest single change in a score throughout the entire survey. Other notable changes were Company 27, with 1.5-point decrease, and Company 30 seeing a 1 point increase. The graph also shows the average across all companies for SCP 10 for



2023 and 2025 respectively.

Figure 5.52**: Comparison between individual company SCP 10 scores 2023 - 2025**

5.13.1. <u>Free Text Responses</u>

26 free text responses were received for this SCP, they have been summarised by Copilot AI, and the following paragraph was generated.

"Disputes with the client are generally rare and, when they arise, are usually resolved at the operational or contract management level without requiring formal escalation. Many respondents highlight constructive relationships, supported by open communication, regular review meetings, and active contract sponsorship from senior management. This collaborative approach is seen as best practice, fostering trust and timely resolution. However, some concerns emerge: feedback is often inconsistent, overly negative, or lacking recognition of positive contributions. A few note assertive client behaviours, one-sided discussions, or potential favouritism toward preferred suppliers, which can create tension. Payment delays are a significant issue for smaller vendors, damaging morale and financial stability. While escalation is seldom used, when it occurs it is viewed as a supportive mechanism rather than adversarial. Overall, the relationship is described as positive and professional, but improvements in structured feedback, fairness, and payment practices would strengthen long-term collaboration."

5.14. Overall Scoring

There were a total of 23 companies that generated more than 10 survey responses. These companies were scored and categorised based on the methodology described in Section 2. Collective scores for each Group have been presented per Supply Chain Principle throughout this report. The collated Overall Scores for each Company Group are presented below (Figure 5.53), with averages also presented for all companies and for all operator/developer groups combined too.

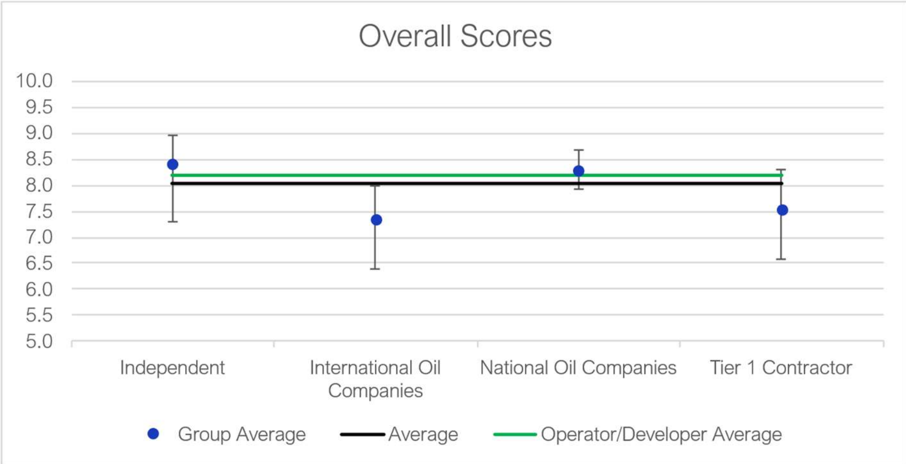


Figure 5.53: Overall average scores by Company Group

Independents consistently performed better than average across all 10 SCP s, and more often than not had the best performing individual company. Overall Independents averaged 8.42, greater than the overall average score of 8.03. IOCs consistently performed worse than average achieving an overall average score of 7.36, and with below average scores for 9 of the SCP s. IOCs performed higher than average only for SCP 9. The worst performing individual company is also an IOC. NOCs typically scored above the overall average for 7 of the SCP s, with an overall average score of 8.25. They had a lower spread than the other categories, showing a more consistent performance. Tier 1s, alongside IOCs, always underperformed, scoring under the average for all 10 SPCs. This category also had a large spread for many of the SPCs, indicating that the performance of an individual Tier 1 company may vary greatly compared to another.

Comparing this year's results to those of 2023, there was a slight increase from 7.89 to 8.03 in the overall score. This is in part due to the significant changes made to the SCP 7 question, which resulted in a large overall improvement (Figure 5.6) for that SCP, as well as the addition of scoring for SCP 9. Other changes made to the questions for this year's survey were not as significant, regardless, it does limit the ability to extract meaningful comparisons for the affected SCP s.

At the individual company level, as mentioned above, there is a clear trend towards a higher scoring for those who participated in both surveys, when compared to 2023. For the reasons given previously (i.e. changes made to the questions and scoring), it is unknown whether the observed increases at a company level can be attributed to actual improved performance, or whether they come as a result of the changes made. Given the general increase in scores, it is worth noting where there was a significant decrease. Company 19, which is mentioned several times throughout this report, experienced a significant reduction in its scores across most SCP s. Overall, it dropped from a score of 7.6 (which was a Silver award), down to 6.2 (No award), a reflection that the responses received from its supply chain were less favourable than those received in 2023. Company 27, also mentioned several times throughout this report, saw a smaller reduction in overall score of 0.7 points.

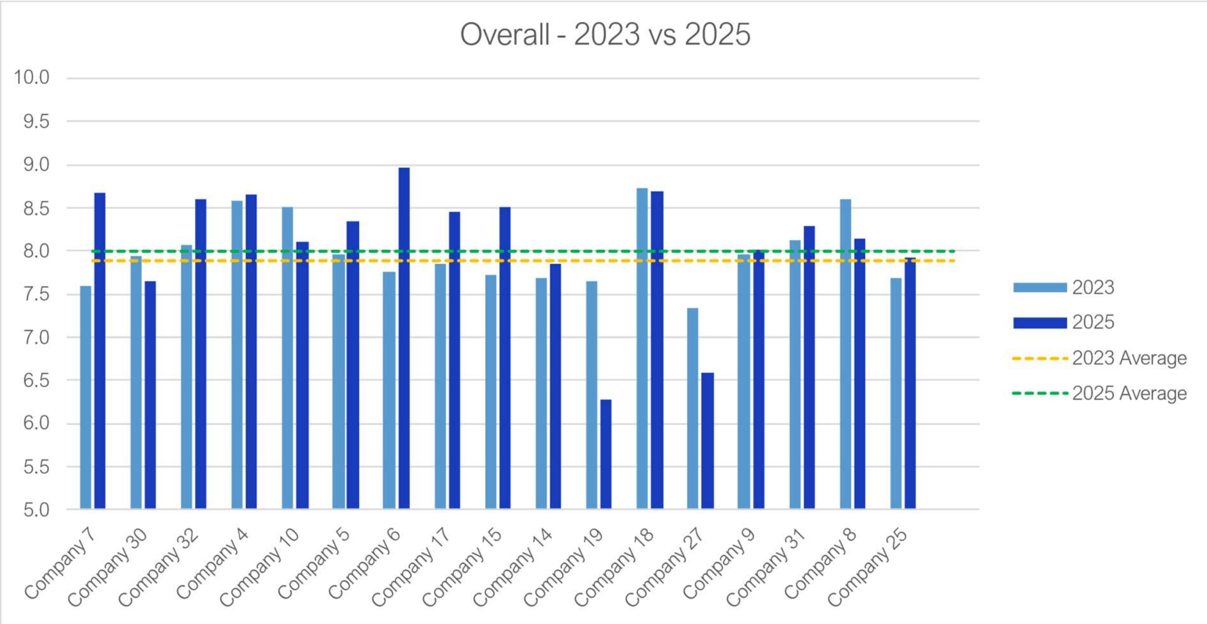


Figure 5.54: Comparison between individual company Overall scores 2023 - 2025

5.14.1. <u>Free Text Responses</u>

85 free text responses were received for in response to the question: “Do you have any final comments that you wish to provide?”. These responses have been summarised by Copilot AI, and the following paragraph was generated.

“The overall sentiment across supplier feedback is strongly positive, with most describing the client relationship as excellent, collaborative, and built on mutual trust, respect, and professionalism. Many highlight long-standing partnerships, some spanning decades, where transparency, fairness, and open communication have created a foundation for successful project delivery. Suppliers consistently value the client’s approachable and pragmatic staff, noting that the relationship often feels like a true partnership rather than a transactional buyer–seller dynamic.

Several comments emphasise the client’s willingness to listen, provide feedback, and engage constructively across operational and commercial levels. This has fostered a “one team” culture, with suppliers motivated to invest in quality, innovation, and local infrastructure to support sustainable operations.

However, recurring challenges are also noted. Payment delays are a significant frustration for some, creating financial strain and administrative burden. Others point to limited early engagement in tendering, a “lowest price wins” procurement mindset, and inconsistent communication across different business units. Some suppliers feel underutilised, wishing for broader opportunities to contribute their expertise.

Overall, the relationship is viewed as highly constructive and valued, with opportunities to strengthen it further through earlier collaboration, consistent feedback, streamlined processes, and a stronger focus on value over cost.”

6. CONCLUSIONS

Key conclusions from the survey are summarised in this section.

6.1. Participation

During the time between May and September when the surveys were active for response, a total of 427 responses were received. This represents a 5% increase over the previous survey in 2023. This is positive and indicates greater engagement than previous.

23 of the surveys received more than the minimum 10 responses (which was increased from a minimum of 7 responses in 2023) required to be able to receive their results and ranking. One other survey received 4 responses, and was also included in the collated results, however they were not included in the ranking.

The Companies taking part were separated into 4 groups, Independents, IOCs, NOCs, and Tier 1s. They were distributed as follows:

- Independents – 10
- International Oil Companies – 3
- National Oil Companies – 4
- Tier 1 Suppliers - 6

Of the responses received, a large proportion were related to Operators, with only a small percentage being related to Tier 1 suppliers. The share of responses was as follows:

- Independents = 42%
- International Oil Companies = 23%
- National Oil Companies = 19%
- Tier 1 Suppliers = 16%

6.2. General Sentiment

The Working As One survey results have enabled insight into supply chain behaviours and sentiment. As well as responses to the Supply Chain Principle questions, feedback was collected in the form of free text responses to each section. 93% of respondents agreed that the Supply Chain Principles were widely understood within their organisation, with 5% responding neutral and 2% disagreeing.

In terms of the Supply Chain Principles themselves, SCP 3, relating to skills and competencies was the principle that scored most highly across all companies, with an overall average of 8.98. SCP 5, related to tendering and auditing, scored the least, with an overall average of 7.38.

6.3. Supply Chain Principle Differences and Focus Areas

6.3.1. General Comparison of Groups

A general trend throughout the survey can be seen when comparing the performance of the company categories. Independents scored above the overall average in all SCP s, and NOCs scored above the average in 7 out of 10 SCP s. IOCs scored below the average in 9 out of 10 SCP s, and Tier 1s scored below the average in all SCP s. More often than not, the lowest scoring company in a section belonged to either the IOC or Tier 1 category. As this trend was apparent throughout the survey, there are clear fundamental differences in the way companies in these categories relate to their supply chain.

6.4. Comparison With 2023 Results

Compared with the 2023 survey results, it appears initially that the performance during this survey was slightly worse across the board, with only a couple of SCP s scoring higher than previous. However, due to changes made to the questions and scoring of the survey, comparing results between the 2 years is not straightforward.

SCP 1: This section scored similarly across both years, with a score of 7.65 in 2023, and a score of 7.56 in 2025. The removal of a question from the scoring in this section would have had a positive effect on the score this year due to the removed question scoring lower than the section average. Therefore, it can be concluded that the reduction in score is genuine and indicates poorer industry performance in this area.

SCP 2: This section also scored similarly across both years, with a score of 8.06 in 2023 and 8.11 in 2025. Several changes were made to this section of the survey, with 1 question being removed and added to SCP 8, and one question's scoring and answers being changed. Of the questions left unchanged, there appeared to be a small decrease in performance, with more respondents answering "Sometimes" or "Never" than previously. The small increase in overall score should not be taken as genuine due to the reasons given above.

SCP 3: This section scored worse overall than 2023, with a 2023 score of 9.27 and a 2025 score of 8.98. No changes were made to the questions or scoring of this section, therefore the results should be fully comparable. The reduction in score came from a poorer performance on the question "Does the customer require you to demonstrate or provide evidence of the competency and skills of those undertaking the work?".

SCP 4: This section had a 2023 score of 7.54 and a 2025 score of 7.40. Some major changes were made to the questions and scoring of this section, so comparison of overall section scores is likely not valid.

SCP 5: No changes were made, therefore the results should be comparable between surveys. This section had a 2023 score of 7.20, and a 2025 score of 7.38, indicating as a slight improvement overall for this SCP. As shown in Section 5.8, there was general improvement across all questions in this SCP.

SCP 6: No changes were made, therefore the results should be comparable between surveys. This section had a 2023 score of 8.03, and a 2025 score of 7.87, indicating a general decrease in industry performance for this SCP. As shown in Section 5.9, there were no questions that performed significantly worse, but overall, the scores were slightly lower than previous.

SCP 7: A significant change was made to a question and its scoring within this section, resulting in the overall score for this section being significantly higher than previous. Therefore, only comparisons between individual questions are valid. Generally, scores for individual questions did not show any significant changes.

SCP 8: One question was added to this section from SCP 2, as well as one question being removed from the scoring. Additionally, 2 of the 3 questions in this section have been changed in some way, making overall comparison between the years difficult. Assessing individual questions, there does not appear to have been a significant change, as described in Section 5.11.

SCP 9: Comparisons between scores for this section are not possible since this section was not scored during the 2023 survey. There was one question in this section which was surveyed previously. The results for this question showed a general increase in performance for this SCP (Section 5.12).

SCP 10: This section is mostly comparable, with the addition of only one question. This section had a score of 8.41 in 2023, and this reduced to 8.10 in 2025. The additional question reduced the score for 2025 since it scored lower than the original two other questions. Comparing just the unchanged questions, this section scored nearly identically between the two years.

The rating given by respondents for their relationship with their client remained identical with an average rating of 4.52 out of 5 in both years.

APPENDIX 1. PREVIOUS SURVEY TABLE OF SCORES

In the previous surveys, participating companies were grouped into 4 categories. Operators were grouped into 3 categories, namely Group A, B and C. Group A included operators with a UKCS total production level greater than 20 mmboe, Group B includes operators with a UKCS total production level between 10-20 mmboe and Group C includes operators with a UKCS total production level less than 10 mmboe. Group D, collectively grouped together any Tier 1s.

Table 6.1: Average scores for ranked section by Group from 2021 Working as One Survey

Groups	Energy Transition	Supply Chain Principle 1	Supply Chain Principle 2	Supply Chain Principle 3	Supply Chain Principle 4	Supply Chain Principle 5	Supply Chain Principle 6	Supply Chain Principle 7	Supply Chain Principle 10	Average	Variance
A	8.24	6.99	7.54	9.84	7.56	7.07	7.04	5.51	8.07	7.54	1.37
B	8.62	7.77	8.04	9.93	7.39	7.52	7.43	6.22	8.46	7.93	1.06
C	8.02	7.70	8.37	10.47	7.39	8.98	8.03	6.20	8.35	8.17	1.35
D	7.40	7.30	7.42	8.59	8.70	6.72	7.36	6.37	8.74	7.62	0.75
Average	**8.07**	**7.44**	**7.84**	**9.71**	**7.76**	**7.57**	**7.46**	**6.07**	**8.40**	**7.82**	

Table 6.2: Average scores for ranked section by Group from 2023 Working as One Survey

Groups	Supply Chain Principle 1	Supply Chain Principle 2	Supply Chain Principle 3	Supply Chain Principle 4	Supply Chain Principle 5	Supply Chain Principle 6	Supply Chain Principle 7	Supply Chain Principle 8	Supply Chain Principle 9	Supply Chain Principle 10	Average
A	7.52	8.08	9.63	7.56	6.89	7.94	6.72	7.60	Not scored	7.67	7.74
B	7.94	8.59	9.16	8.20	7.85	8.65	7.31	7.87		9.10	8.30
C	7.63	8.82	9.19	7.28	7.45	7.76	6.22	8.87		8.80	8.00
D	7.53	6.76	9.17	7.26	6.67	7.82	6.90	8.04		7.74	7.54
Average across all operator groups	7.70	8.50	9.33	7.68	7.40	8.12	6.75	8.11		8.52	8.01
Overall Average	7.65	8.06	9.30	7.48	7.20	8.03	6.77	8.24		8.41	7.90