THE RUDDICK OILFIELD SUPPLY COMPANY
SERVICE PERFORMANCE INDEX REPORT -- 2004
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What Are Customers Saying?

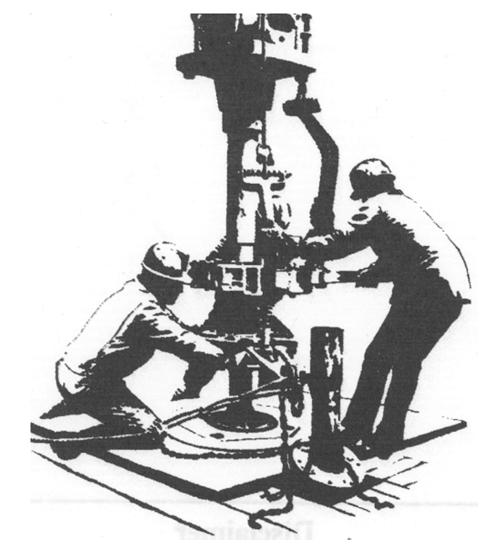
About Selection Factors and Preferences Among Oilfield Suppliers

Enhance Your Competitive Edge With Strategic Insights from....

THE RUDDICK OILFIELD SUPPLY COMPANY SERVICE PERFORMANCE INDEX REPORT -- 2004

Developed by The Ruddick Int'l Group, a leader for more than 25 years as a top independent consulting firm to the energy industry, **The Ruddick Service Performance Index Report** puts in your hands exclusive survey-based research on your customer's perceptions of key competitor's performance.

More than 90 pages of competitive intelligence on the performance of International and North American oilfield service supply firms.



This custom-designed **Ruddick SPI** provides the timely market insights you need to help identify central issues and their effects on their customers, while revealing the customer perspectives needed to strengthen your competitive advantage in meeting customer needs.

The Ruddick Oilfield Service Performance Index is an invaluable, up-to-date measure of oilfield service supply company performance that comes from the "horses mouth" ...... operating and drilling company decision-makers!

"Accurate, up-to-date market feedback is essential in today's competitive, evolving markets, but the competitive edge goes to the firm that knows what to do with that information ... and that is where strategy begins."

Morris E. Ruddick
Founder, The Ruddick Int'l Group

Frequently Asked Questions About the 2004 Ruddick Oilfield Supply Company Service Performance Index Report

The Ruddick Int'l Group

Strategy, Planning & Research

Since 1977, ***The Ruddick Int'l Group's*** team of seasoned consultants has provided senior management reports based on primary feedback from the marketplace. These services began with a specialty in serving oilfield service-supply firms, offshore contractors, the investment community and other technology-related industries with market opportunity and market impact evaluations. Over the years, our expertise has extended to include business and strategic planning.

The Ruddick Int'l Group's expertise focuses on assignments involving emerging markets, markets undergoing change, service performance, customer behavior/need evaluations and opportunity assessments.

Emerging Markets and Technologies. Most technology-driven market environments reflect an incredible level of technological leapfrogging and change. This in turn impacts opportunity and demand. Successful companies have learned to anticipate change through a blend of strategic thinking and staying in touch with the pulse of the marketplace. Our background in emerging market arenas is formidable—especially within the oilfield, offshore and high tech arenas—and reflects an understanding of the dynamics at work within shifting, changing, developing markets. This understanding combines with a senior management perspective enabling us to identify the direction of the market; and with that, the anticipatory responses needed to capitalize on change and opportunity.

How was the information for the Ruddick SPI developed?

Extensive survey interviews conducted with 512 key decision-makers within global integrated, independent, national oil companies, as well as drilling contractors form the basis of this report. The results reflect a good cross-section between land and offshore operations, as well as management levels in each major operating region around the world. Forty percent of those surveyed had spending authority that exceeded $8 million in the last year. The insightful and timely infomration reflected in this report zeroes in on the differences in selection approaches and service needs regionally, as well as between majors, large, medium and small independents, national oil companies and drilling contractors.

How are responses viewed regionally?

Worldwide Report
US Land, US Offshore, Canada, Latin America, North Sea, Europe, Eastern Europe, CIS, Middle East, Africa, Asia, Australasia

North American Report
West Texas, Gulf Coast, East/Central Texas, Louisiana, Gulf of Mexico, Mid-Continent, Rocky Mountains, West Coast, NE/SE,Canada-Land, Canada-Offshore

This report addresses not only key measures of service performance; but will answer the question of "why" ...

... why those considered the leaders ..... within the ranks of both the Tier 1 integrated supply firms as well as the other major service providers for each primary equipment category .... are ranked as leaders by the firms that use them.

What kind of equipment lines and services did the companies surveyed purchase in the last year?

- Directional Drilling & MWD Services
- Drill Bits, Drilling Fluids, Drilling Equipment
- Geophysical & Wireline Logging Services
- Pressure Pumping Equipment & Services
- Lift Systems & Process Equipment
- Rig Equipment & Tools
- Completion Equipment
- Well Servicing
- Drilling Services

Issues Addressed by the 2004 Ruddick SPI Report

- Preferred suppliers for each major equipment/service category
- Reasons for preferred suppliers in each equipment/service category
- Service expectations for each equipment-line by type of company and region.
- Strengths and weaknesses of each major supplier as viewed regionally and by type of company
- Profiles based on how customers indicate their suppliers are doing in each of the 12 Ruddick SPI service criteria according to region and type of company
- Most important factors used for selecting service supply firms between majors; large, medium and small independents; national oil companies; and drilling contractors
- Importance of product performance versus service performance
- Subtleties in the value of supplier relationships versus costs
- The role of operational expertise for service supply firms
- The importance given to technological advancements
- Gaps between what suppliers offer and what customers expect — misconceptions of the market by suppliers
- Strengths and weaknesses in the Tier 1 "all things to all people" approach
- Ratio of equipment and services acquired from the Tier 1 integrated supply firms versus other suppliers…and why
- Types of service solution/risk-reward contracts (alliances; bundled services; integrated solutions) being used by what type of companies…and satisfaction indicators
- Trends for integrated service solution contracts

What do custom customer surveys and management planning reports normally cost?

Custom North American surveys can range between $25,000 to $50,000, while worldwide studies can exceed $75,000. But because of our longstanding work in this industry, we are taking advantage of economies of scale and making the exclusive, survey-based Worldwide SPI report available to individual companies for only $7,499 and the North American report for only $3,499..

*The Ruddick Service Performance Index (SPI) is designed to provide **a timely, periodic measure of oilfield supply and service company service performance**— from the perspective of those who are the operating company decision makers selecting which supply companies they use*

Oilfield Service Performance

During the last decade, Ruddick Int'l's work in oilfield service-supply business has taken the position that the basic assumptions driving the oilfield supply business have changed. This is an industry that was once driven by a mind-set focused on market share. The underlying premise behind this evaluation is that functionally, ***this industry has become a service economy***. Between the customer - the operating company and drilling contractor - and the supplier there is now a "service layer." The displacement of the market-share mind-set — and a mind-set focused on the best widget at the best price – is at the core of the change. *The shift is toward a strong customer-driven demand for service performance is central to realistically evaluating market opportunity in fast-paced, changing markets.*

The Ruddick Int'l Group has been evaluating Service Performance in this industry since 1977. At the heart of our work in the oilfield service-supply business is the Ruddick Service Performance Index™. The Ruddick SPI was designed specifically for the upstream and downstream petroleum industry. It has been tested and refined over the years. It provides strong indicators that relate to both the risk-reward trends and scenarios; as well as in the dimensions that bear on the importance associated with preferences and opportunity for expansion and new product acceptance within this industry.

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