



Automated tax advice for commercial deals

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Agenda

Introduction

Challenge

Solution

Lessons learned

Introduction

From the reservoir to the refinery We are fullstream

We are BHGE

Only BHGE has a fullstream capability: **the portfolio, the technology, and the people** to radically transform the oil and gas industry and deliver **unparalleled improvement in industrial yield** for our customers.

120
COUNTRIES

64K+
EMPLOYEES

4
PRODUCT
COMPANIES



BHGE: We are fullstream

Fullstream projects leverage the breadth of the BHGE portfolio, combined with new commercial models, to drive successful outcomes for our customers.



UPSTREAM

Evaluation
Drilling
Completion and Production
Subsea



MIDSTREAM

LNG
Pipeline
Storage



DOWNSTREAM

Refining
Petrochemical and Fertilizer
Processing



INDUSTRIAL

Power and Renewables
Control and Sensing

DIGITAL

Software, advanced analytics, controls and sensing, and asset performance management

Early engagement to maximize the end-to-end value chain

Horizontal approach with connection at all levels within the customer's organization

Partnership and support during all phases of the project

Fullstream commercial models that deliver changes in project economics by lowering the cost of production and increasing industrial yield

Sharing risk and reward. Reducing costs. Increasing productivity.

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BHGE offerings

42% of revenue generated
from equipment sales / 58%
from services



Maintenance & repair service



Spare Parts



Projects



Consumables



Inspection Services



Handheld devices

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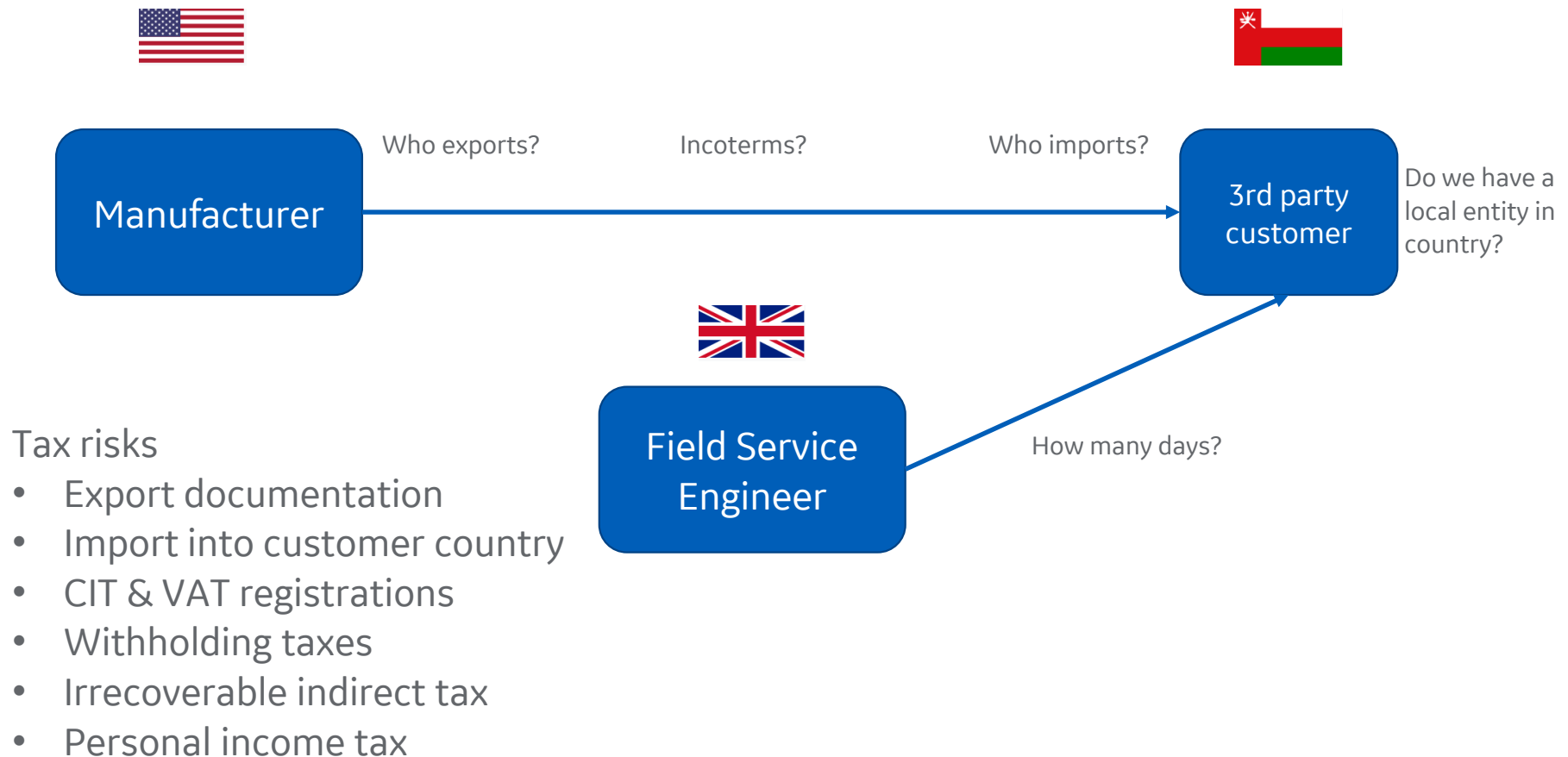
Challenge

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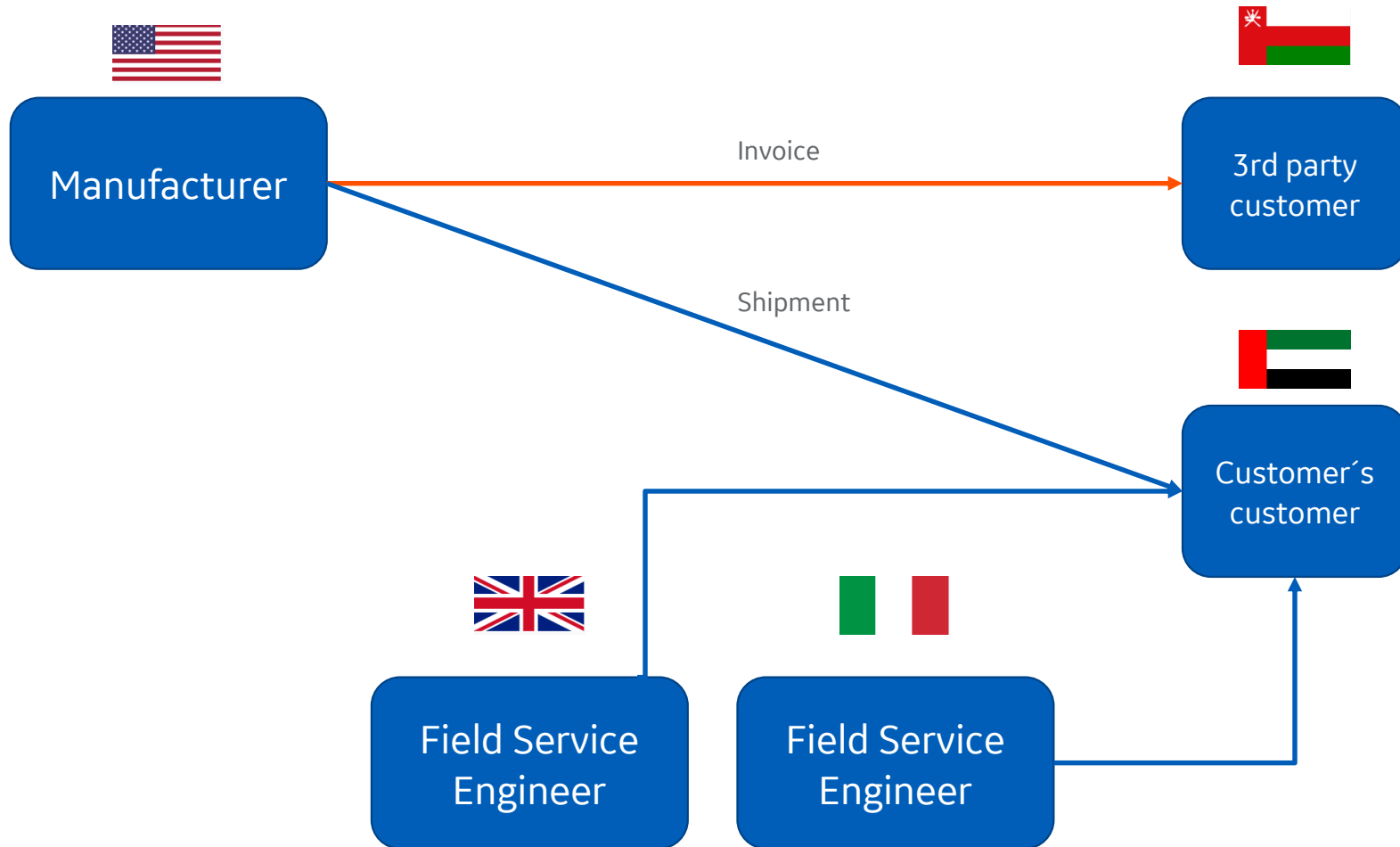


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Typical transactions - simple

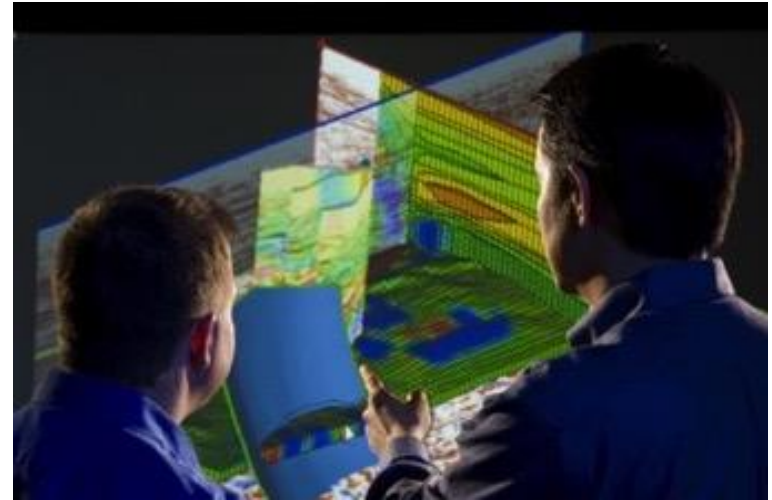


Typical transactions - complex



Traditional Tax Advice

- Tax awareness training
- Emails
- Phone calls
- Checklists



User feedback

- Time zone differences
- Lengthy emails chains
- Inconsistent answers
- Slow responses



Resource concerns

- Time spent on simple orders, at the expense of the complex scenarios

Solution

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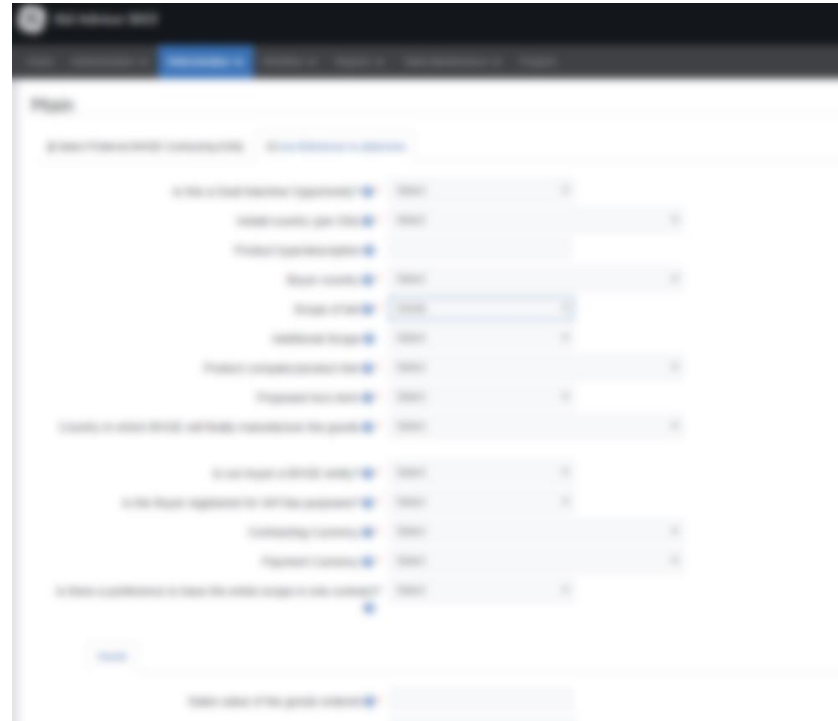
Evolution from Excel table to Web based Tool

Activity	Duration	Start Date	End Date	Start Time	End Time	Frequency	Location	Notes
1. Review and approve the project plan	1 day	2023-01-01	2023-01-01	09:00	17:00	1	Office	
2. Develop the project plan	3 days	2023-01-02	2023-01-04	09:00	17:00	3	Office	
3. Implement the project plan	5 days	2023-01-05	2023-01-09	09:00	17:00	5	Office	
4. Monitor and control the project plan	2 days	2023-01-10	2023-01-11	09:00	17:00	2	Office	
5. Close the project plan	1 day	2023-01-12	2023-01-12	09:00	17:00	1	Office	



Issues with Excel tables

- Version control
- Slow



BidAdvisor Project

- First phase - only VAT and direct tax
- Second phase – VAT/Direct tax plus Mobilization, Treasury and Legal
- One or two experts from every function
- Lobbying/Marketing & Project Lead by Tax
- One Software Architect + one Developer (Oracle, ColdFusion, HTML)
- Early involvement of users (Superuser)



Questionnaire

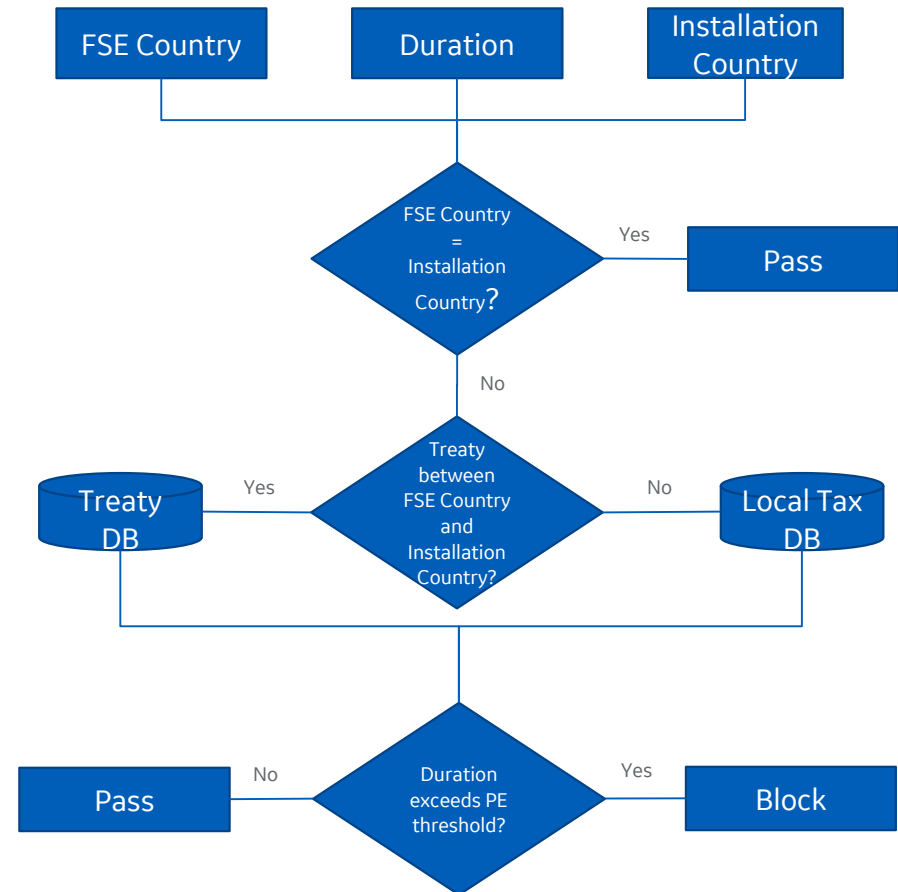
- Short questionnaire for simple scenarios
- Conditional questions depending on user's input
- Important to use user's terminology

The screenshot shows a web-based questionnaire interface. It features a header with a logo and navigation tabs. The main content area is divided into several sections, each with a title and a list of questions. The questions are presented as a series of dropdown menus and checkboxes. The interface is clean and professional, with a dark header and a light background for the questionnaire content.

Logic

- Set of rules to check a particular risk
- Currently 45 rules
- Result is always Pass or Block
- A scenarios passes, if all rules pass

Example Construction PE risk



Database

- Tax databases
 - Treaties
 - Local tax rules (PE thresholds, WHT)
 - VAT (reverse charge)
- Treasury databases – restricted currencies, high inflation countries
- Mobilization database – visa cost and requirements
- Legal database – licence restrictions
- Legal entity database



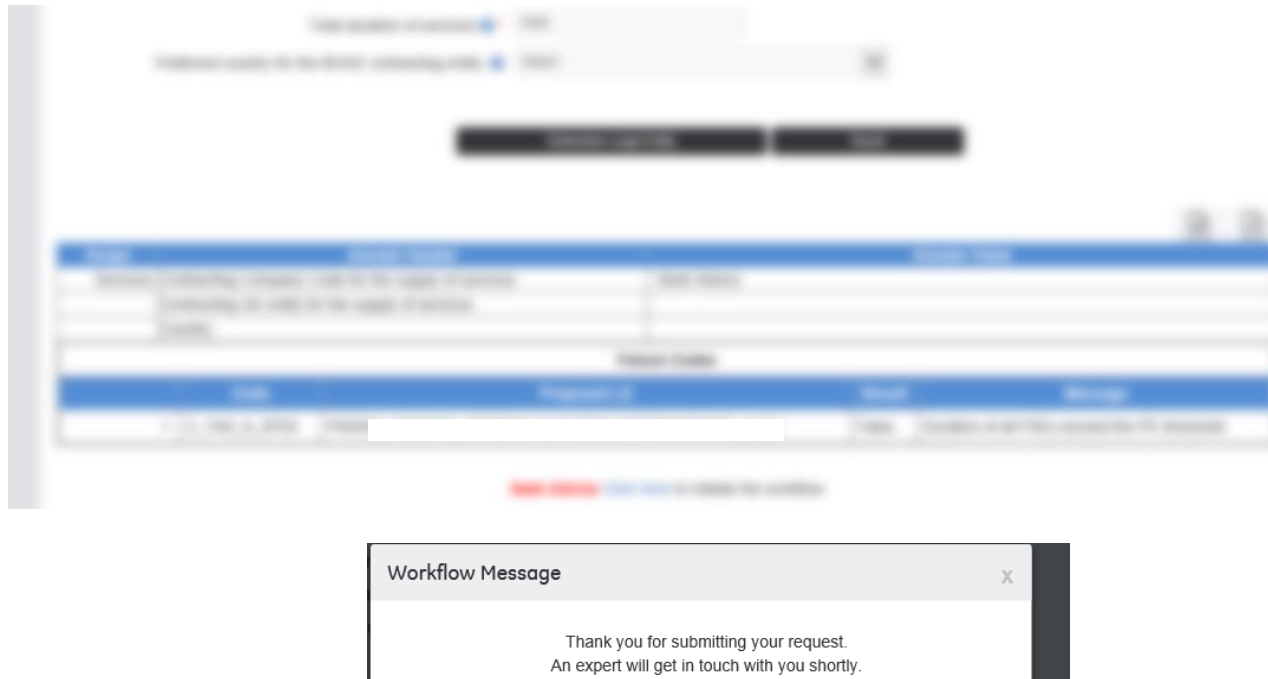
Output (1)

- Tax efficient Legal entity to contract with the customer
- Additional Tax information
- Treasury, Legal and Mobilization requirements

The image shows a blurred screenshot of a software application window. The window has a blue header bar with some text that is illegible. Below the header, there are several input fields and a table. The table has multiple columns and rows, with some cells containing text that is too blurry to read. The overall layout suggests a complex form or data entry screen.

Output (2)

- Workflow process, if no legal entity meets requirements
- Automated routing to functional expert – tax, treasury, mobilization, legal
- Advice provided within the workflow process – no email chains
- Dashboards for submitter and functional experts – filter by date, status etc.



Rollout

- Training, Training, Training
 - On site
 - Webex/Skype
 - Online Course
- Leadership support
- Integration into User's tools and processes

Agenda

Big Picture: What is **BidAdvisor**

Importance of Legal Entity Selection

Overview of **BidAdvisor**

BidAdvisor demo

#6 to unmute
your line & ask
a question



BIDADVISOR BASICS



What is BidAdvisor?
👁 NOT WATCHED



What is an optimum legal entity and
why is it important?
👁 NOT WATCHED

Next steps/long term vision

- Integration into CRM tools
- Improve data maintenance process (external databases, NLP technology)
- Automated table updates based on manual reviews (machine learning)



Lessons learned

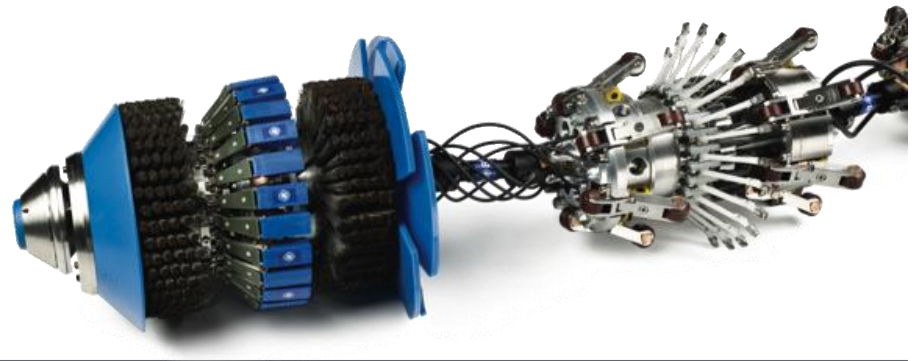
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Lessons learned

- Communication is key!
 - Use user's communication channels
 - Respond quickly
- Early roll-out is good, but Tool should not have too many bugs – otherwise users lose patience
- Listen to user's feedback, but don't implement every suggestion
- Data maintenance must be managed
- Project needs fully dedicated resource



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