

THE FUTURE OF COLLABORATION

A survey of collaborative work environments in the oil & gas industry



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Executive Summary

This study aims to map how companies in the Oil & Gas industry utilize collaborative environments (CEs) to achieve business objectives, and how technology is applied to support these structures and work processes. The survey further identifies and explores common shortcomings and bottlenecks experienced by companies trying to realize the potential value of collaboration. The survey concludes with a discussion of mission critical capabilities for Oil & Gas companies that are interested in using collaboration as a strategic enabler of productivity, decision making and knowledge sharing.

MAJOR FINDINGS

CEs are mission critical - a majority of survey participants view CEs as mission critical, and they also expect to see a higher demand for such facilities as the number of known uses and benefits continue to increase.

Audio conferencing, video conferencing and data sharing are the most important functionalities provided by CEs, but many respondents find the applications difficult to use.

Current and anticipated use is higher than expected. More than 75 % of users expect to see more CEs in their corporations, and in excess of 30 % work in CEs more than 6 hours per week.

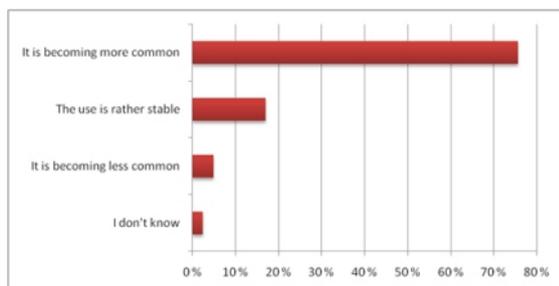


Exhibit 1: Use of collaborative environments

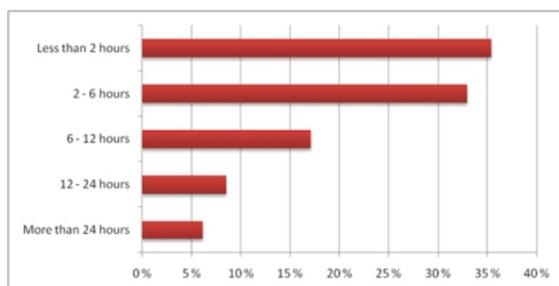


Exhibit 2: Amount of time spent in CEs

SURVEY FACT BOX

- *Participating companies: 43*
- *Web survey respondents: 103*
- *In depth personal interviews: 9*
- *Survey designer: Kristensen Consulting*
- *Survey sponsor: Cyviz AS*
- *Report format: 23 pages, 22 exhibits*
- *Price: USD 12 000 - free copy available for participating companies*

Integrated operations and related concepts are reaching a stage of maturity, resulting in business objectives driving investment decisions rather than AV integrators running the show based on technology driven opportunities and proprietary knowledge.

The major challenges often lie within the organizational structures, work practices and implementation capabilities, not necessarily with technology as such. Many users believe standardization will speed up the introduction of CEs.

Multi-purpose CEs are increasingly becoming popular. Layouts and solution offerings must handle a number of different locations, user groups, processes and settings in a flexible manner.

The failure rate of CEs is too high. This is partly due to poor reliability and partly to poor usability in real life contexts. Intuitive user interfaces, standardization, reliable service concepts, awareness and training are identified as key remedies.

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About the Survey

In this survey, more than 275 oil & gas professionals have been invited to share their experiences with collaborative work environments. 9 in-depth interviews have been carried out to complement and enrich the findings from the online survey.

The survey response rate is 37 %, with 71 tracked responses from named individuals, and 32 additional responses from internal e- mail forwarding in oil & gas companies that have requested respondents to be anonymous. The total number of companies represented in the survey is 43. The survey has a near global coverage, with the following regions represented: Europe (66 %) / North America (17 %) / Middle East (14 %) / other (3 %).

A number of roles are represented in the survey, including geologist, geophysical, petrophysicist, petroleum engineer, project manager, IT / AV infrastructure, interpretation / visualization software QA, business development manager, business analyst, general manager, HSE engineer, industrial designer of collaborative environments, corporate support, and business analyst.

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