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**Microsoft®**

**Microsoft and Accenture Oil & Gas  
Collaboration Survey 2011**

Microsoft Global Energy Forum 2011

January 2011

# Methodology



- Third Oil & Gas Collaboration Survey funded by Microsoft Corp. and Accenture
- Online survey of 205 oil and gas industry professionals including engineers, mid-level and executive management, business unit heads and staff, project managers and geoscientists from a cross-segment of the industry
- Conducted in October 2010 by Tulsa, Okla.-based PennEnergy in partnership with the Oil & Gas Journal Research Center
- Respondents are subscribers to PennWell publications

# High-Level Trends



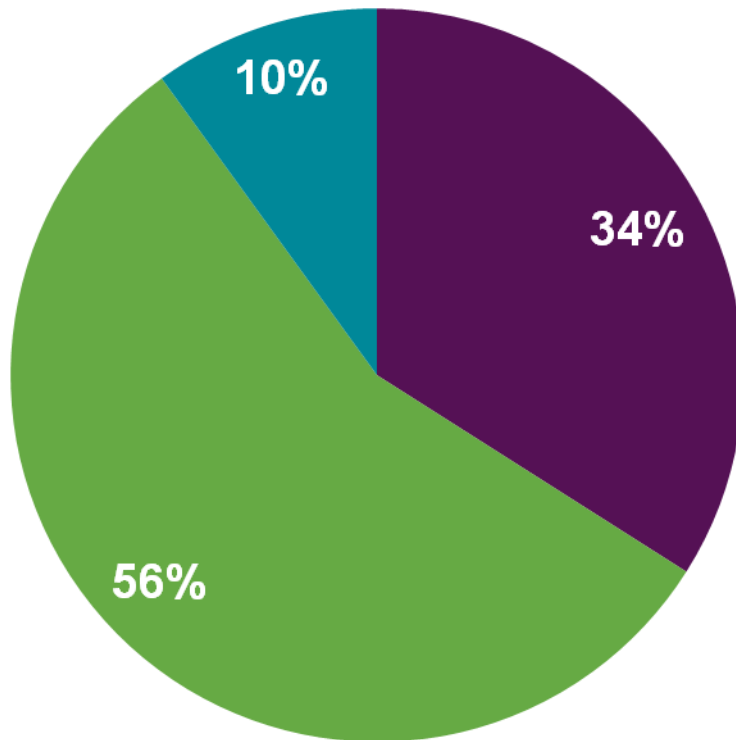
- Directionally, the percentage of oil and gas professionals that are collaborating is increasing; 34% reported they spent more time collaborating this year than the previous year
- Companies are adopting and providing social networks as a business collaboration tool, with the use of corporate social networking and instant messaging increasing, year over year
- The Oil and Gas Industry is faced with an aging workforce, and technology-driven access to people and information will lessen the impact resulting from a scarcity of skills and talent
- Oil and gas professionals cite the need to for technology capabilities to collaborate from anywhere at any time using any device as critical to a company's success

# High-Level Trends



- The biggest barriers for collaboration are identified as broken workflows and process bottlenecks that prevent information flow and challenges in regards to knowledge sharing
- To address these collaboration barriers, technology enhancements that improve timing to streamline decision-making, improve interaction capability through any device and improve computing power are needed
- Collaboration is an integral part of oil and gas professional's daily work environment; industry trends and workplace dynamics are shaping the need to collaborate even more

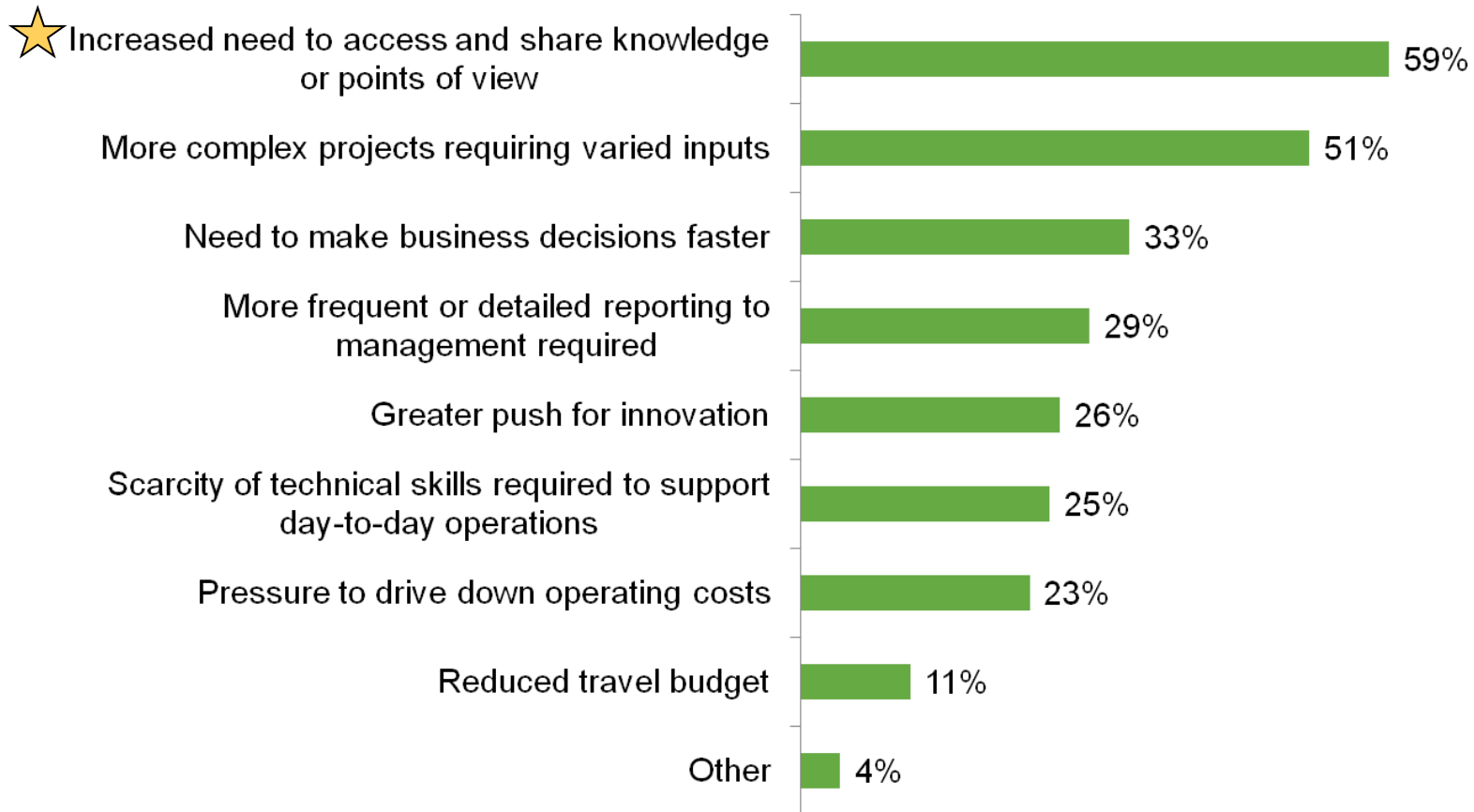
# 34% are Spending More Time Collaborating than Last Year



- Collaborate more than one year ago
- Collaborate the same as one year ago
- Collaborate less than one year ago

How does this compare to the amount of time you spent collaborating with others one year ago?

# The *Need to Access and Share Knowledge* is a Key Driver for Collaboration



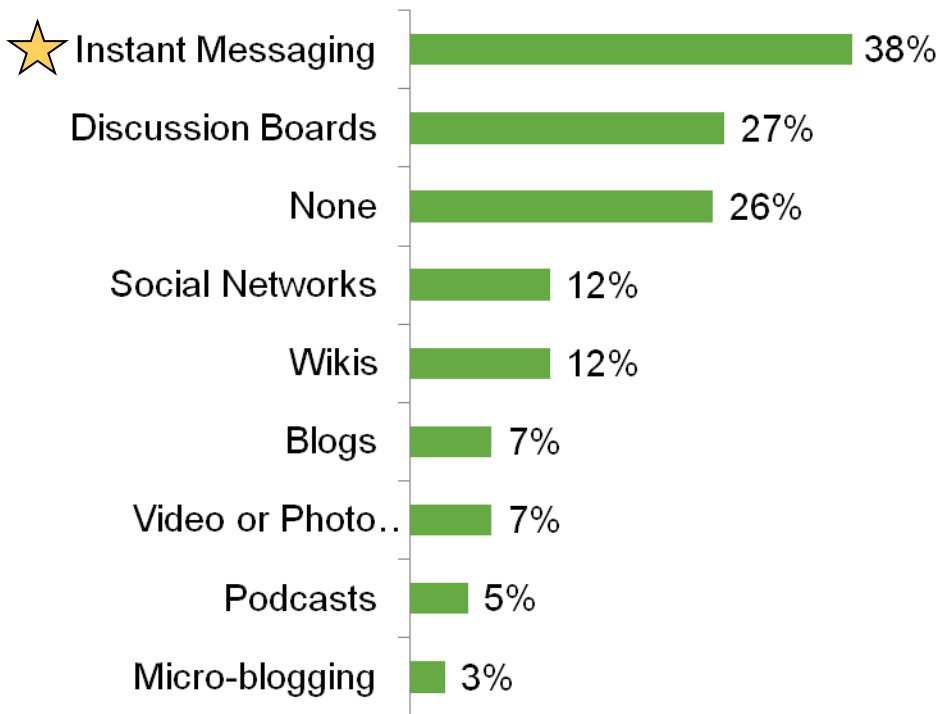
What factors at your workplace are driving your need for collaboration?  
(Select your top three.)



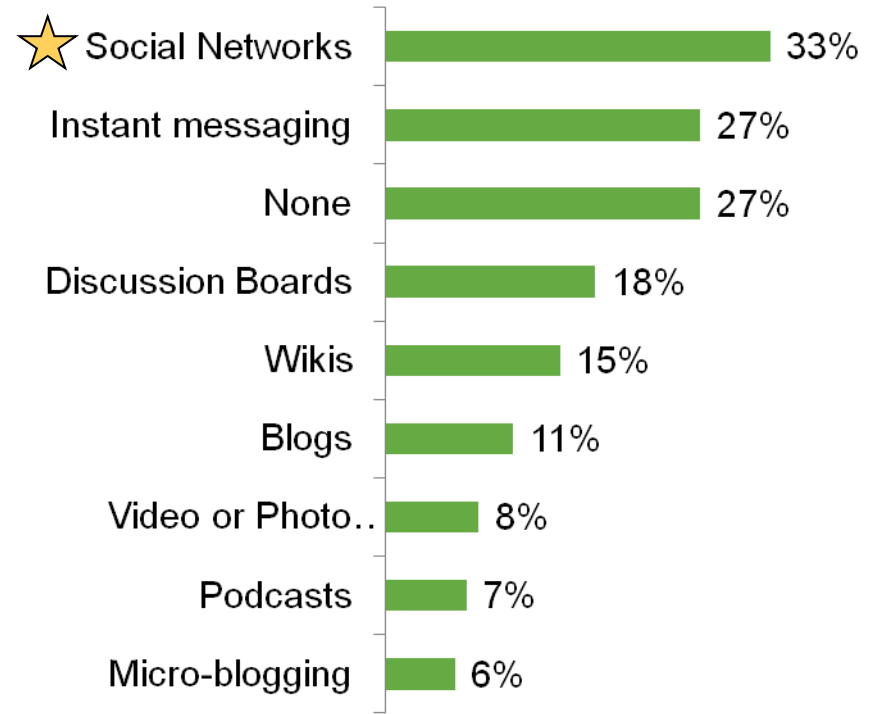
# Instant Messaging and Social Networks are the Most Widely Used Social Media Tools for Business Collaboration



## Public Social Media Tools



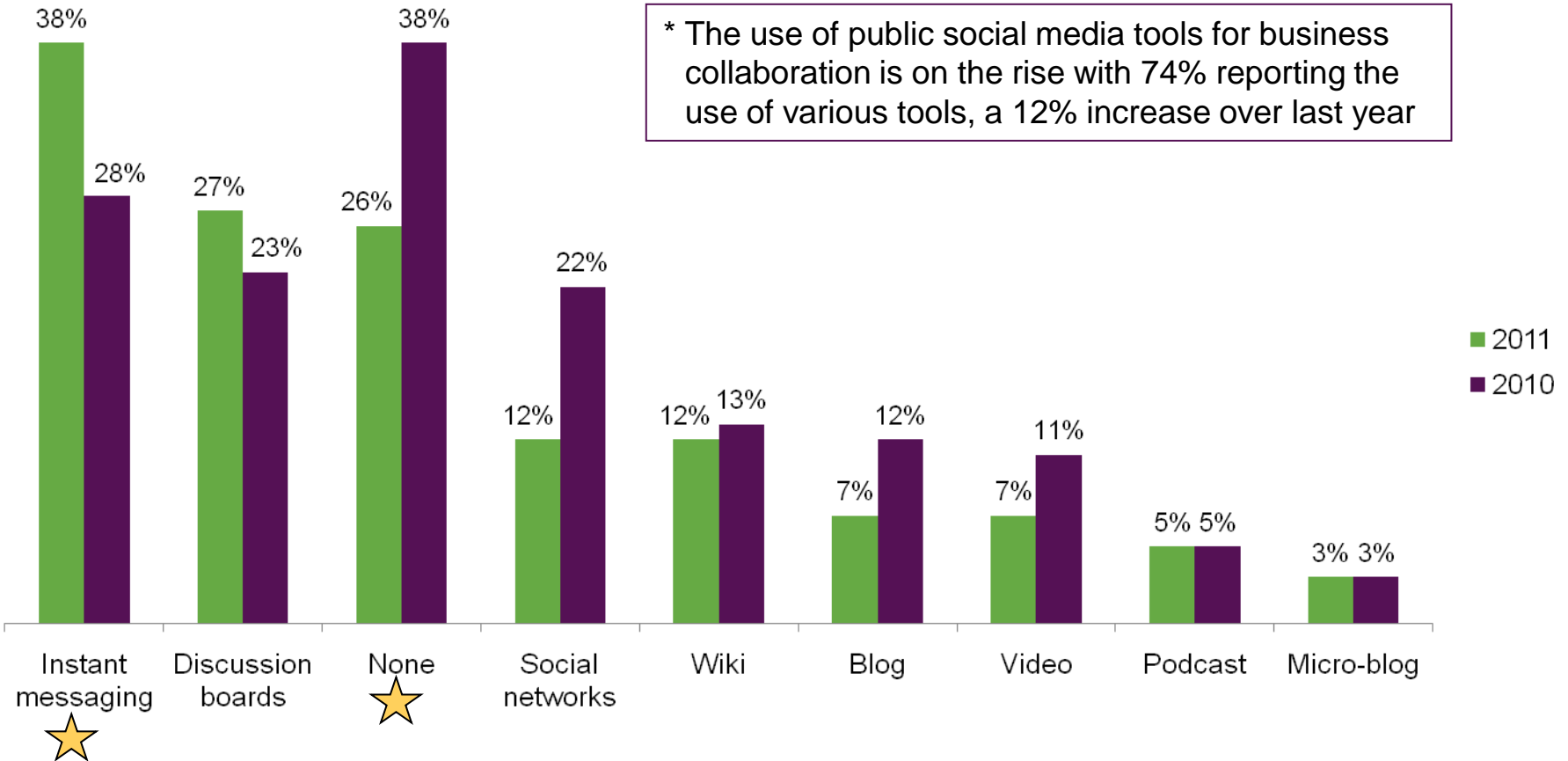
## Company Social Media Tools



Which of the following social media tools do you currently use for business collaboration? (Select all that apply from both columns.)

\* The use of social media tools is on the rise with 74% reporting the use of various public social media tools, and 73% reporting the use of company social media tools

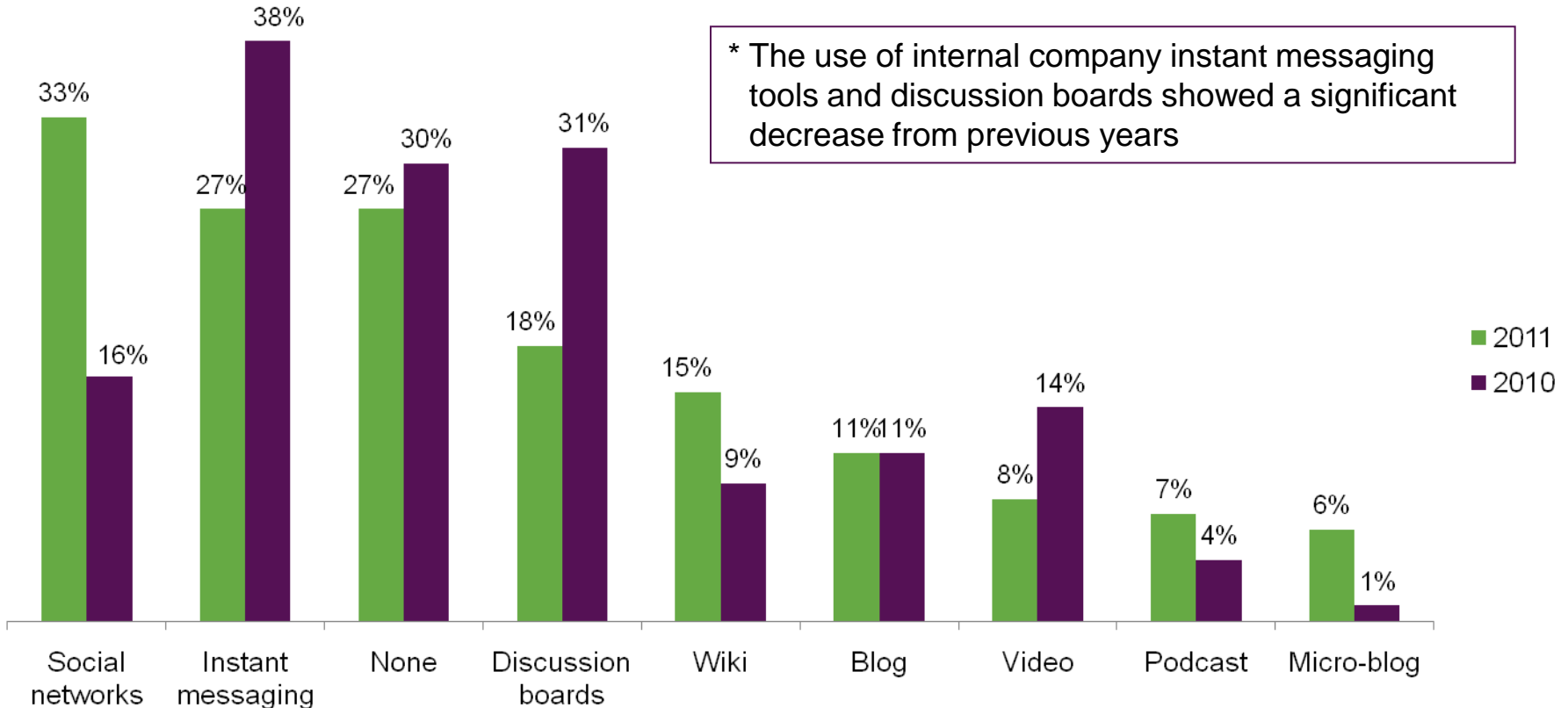
# Use of Public Instant Messaging Tools, and Public Social Media Tools Overall, is Directionally Increasing Year-Over-Year



Which of the following public social media tools do you currently use for business collaboration? (Select all that apply from both columns.)



# Use Internal Company Social Networks has Doubled Over the Previous Year



\* The use of internal company instant messaging tools and discussion boards showed a significant decrease from previous years

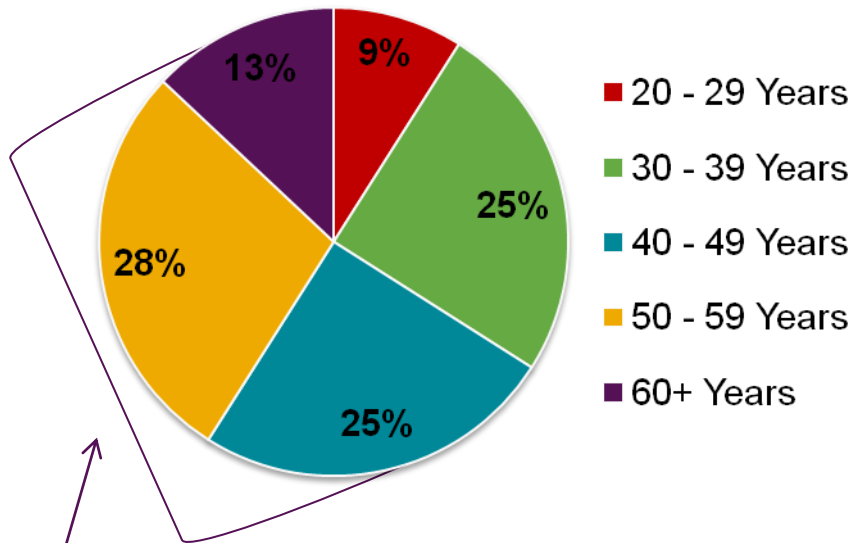


Which of the following internal company social media tools do you currently use for business collaboration? (Select all that apply from both columns.)

# The Oil and Gas Industry is Faced with an Aging Workforce...

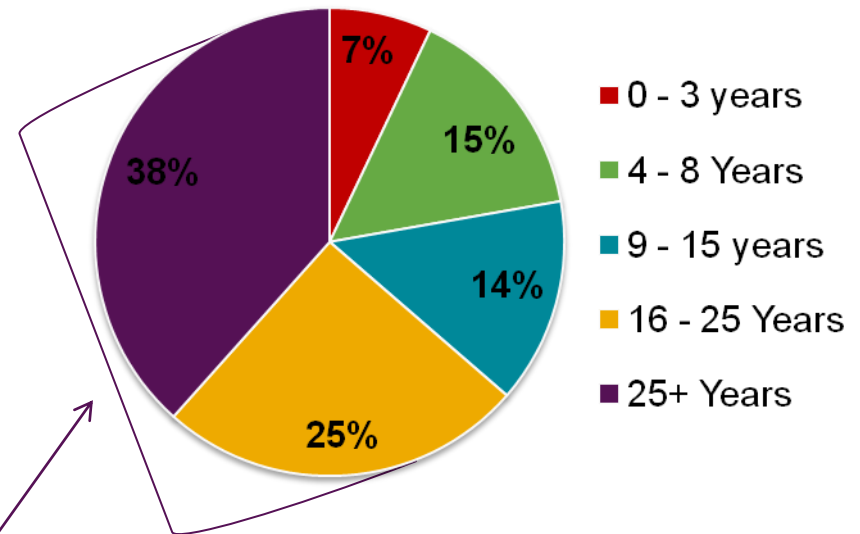


## Age



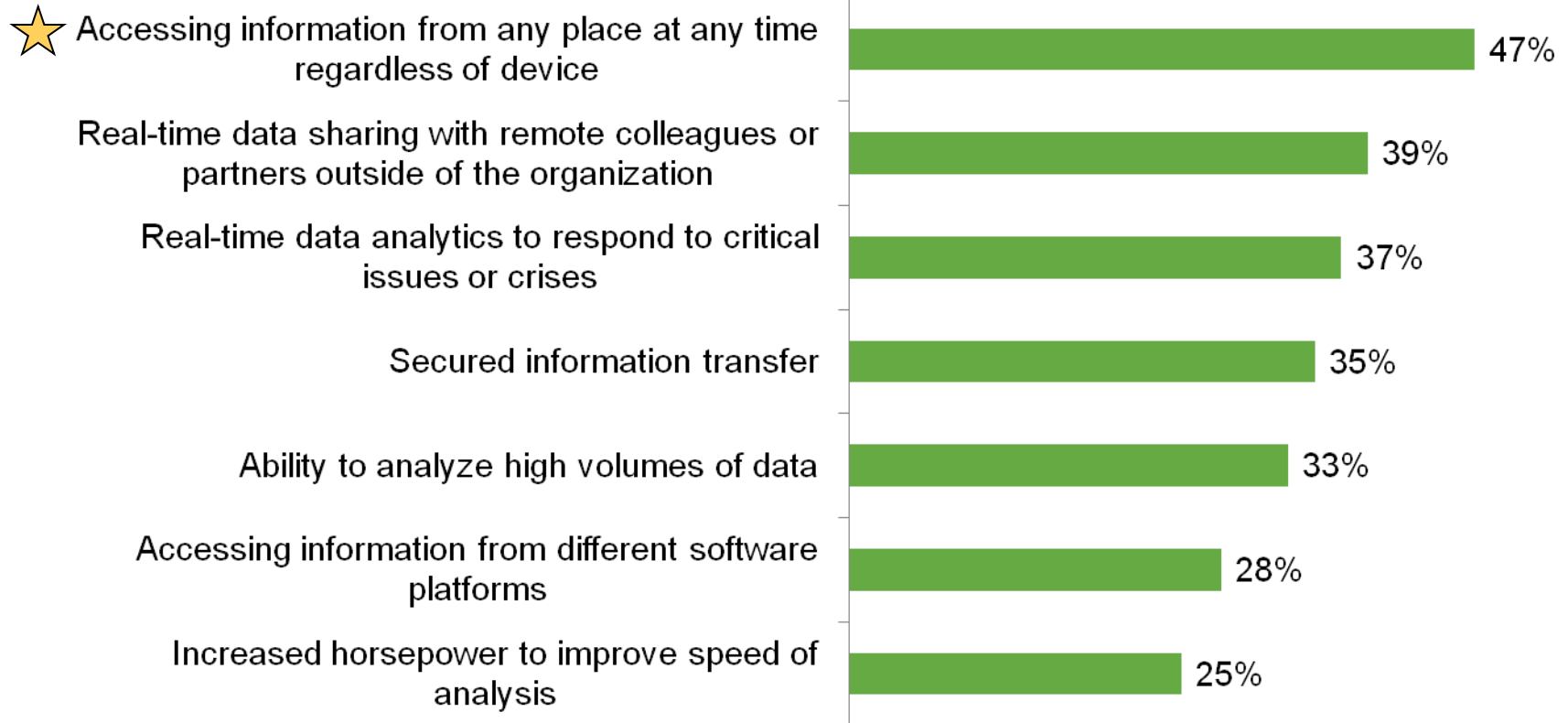
\*Nearly two-thirds (66%) are 40 years and older.

## Years of Experience



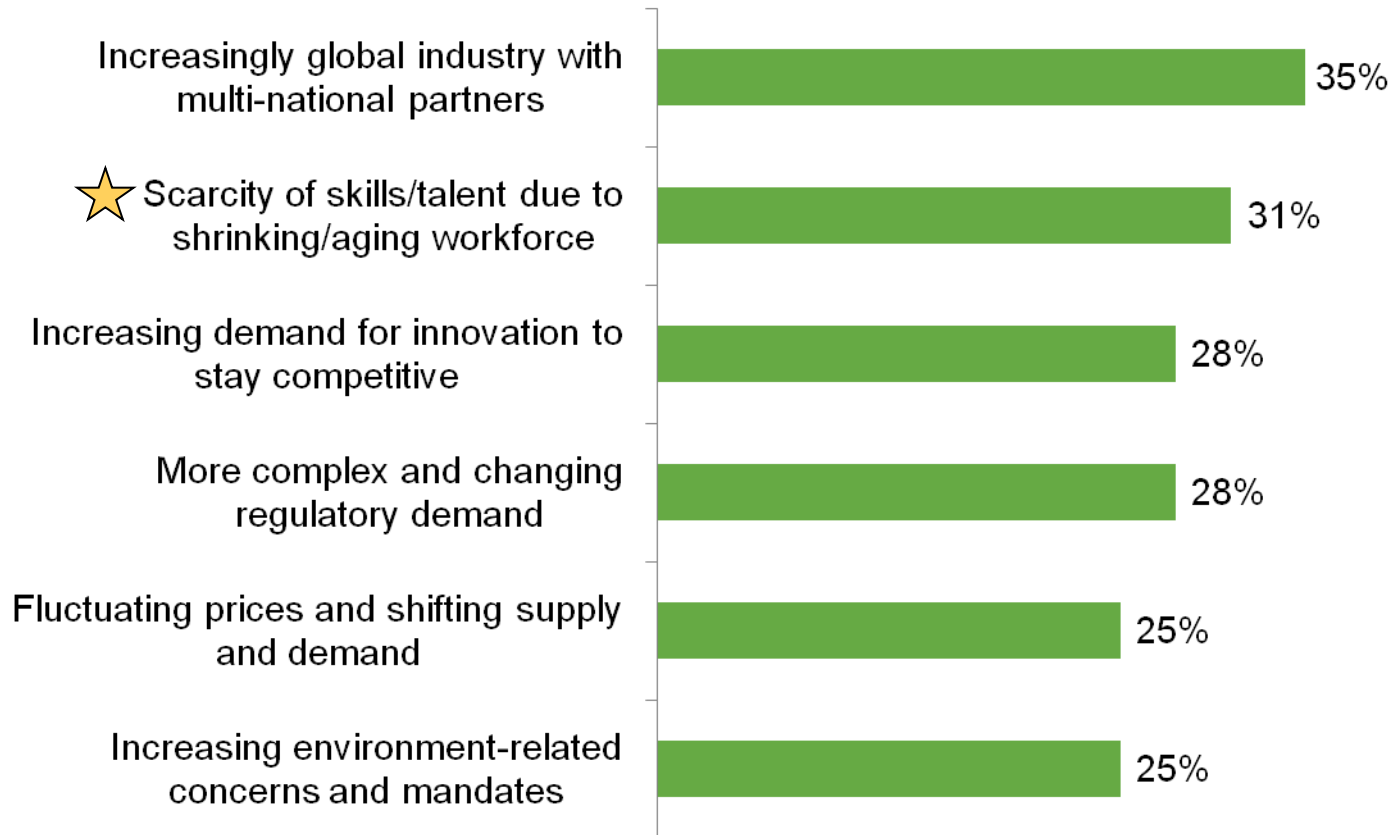
\*Nearly two-thirds (63%) have more than 16 years of experience.

# Access to Information From Any Place at Any Time Regardless of Device is Important for Business Success



Which of the following enhanced data analysis capabilities would positively impact your company's success? (Select your top three.)

# Nearly one-third Identified that Improved Technology-Driven Access to Information is Needed to Address The Aging Workforce

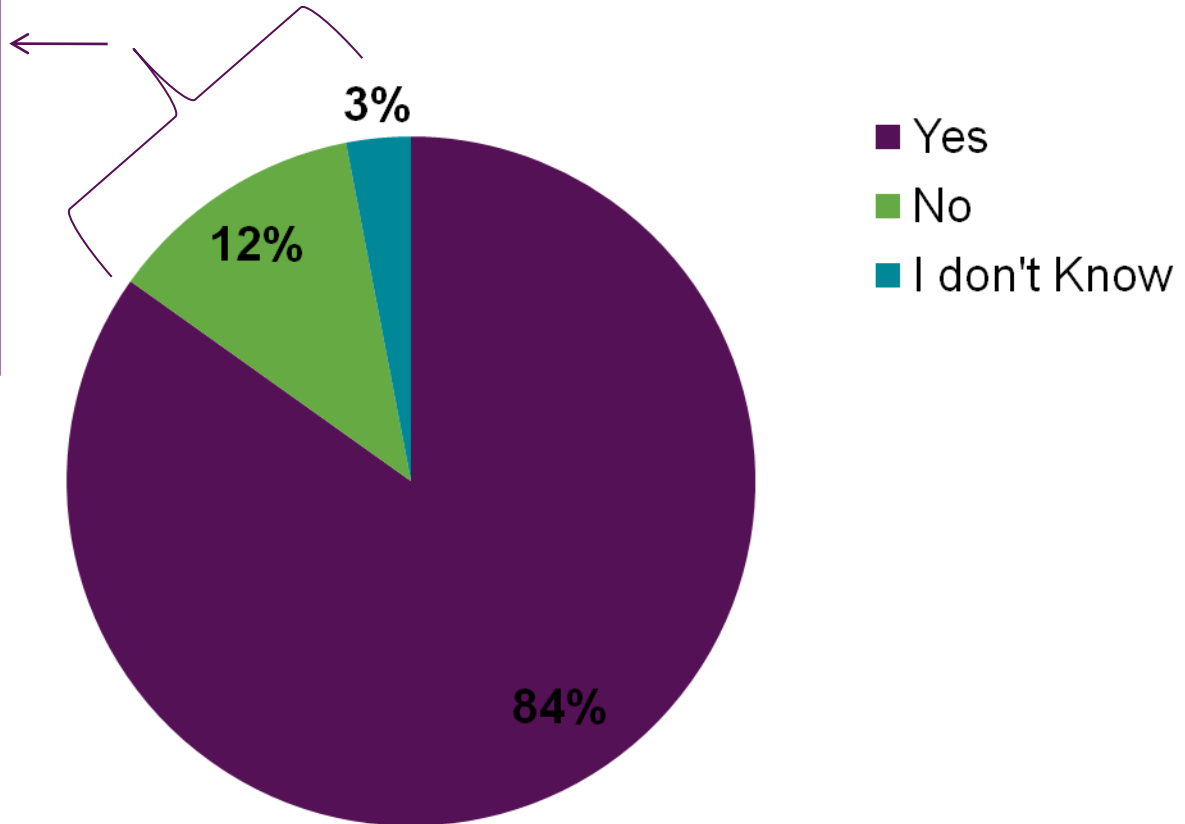


Which of the global trends below do you think would have less of an impact on business given improved technology-driven access to information, internally and externally?

# The Majority of Respondents Have or Want the Ability to Contact Colleagues from Any Place at Any Time from Any Device



Of the 15% of respondents who do not have or do not know if they have the ability to contact colleagues from any place at any time from any device, 74% said that this capability would be very or somewhat valuable.

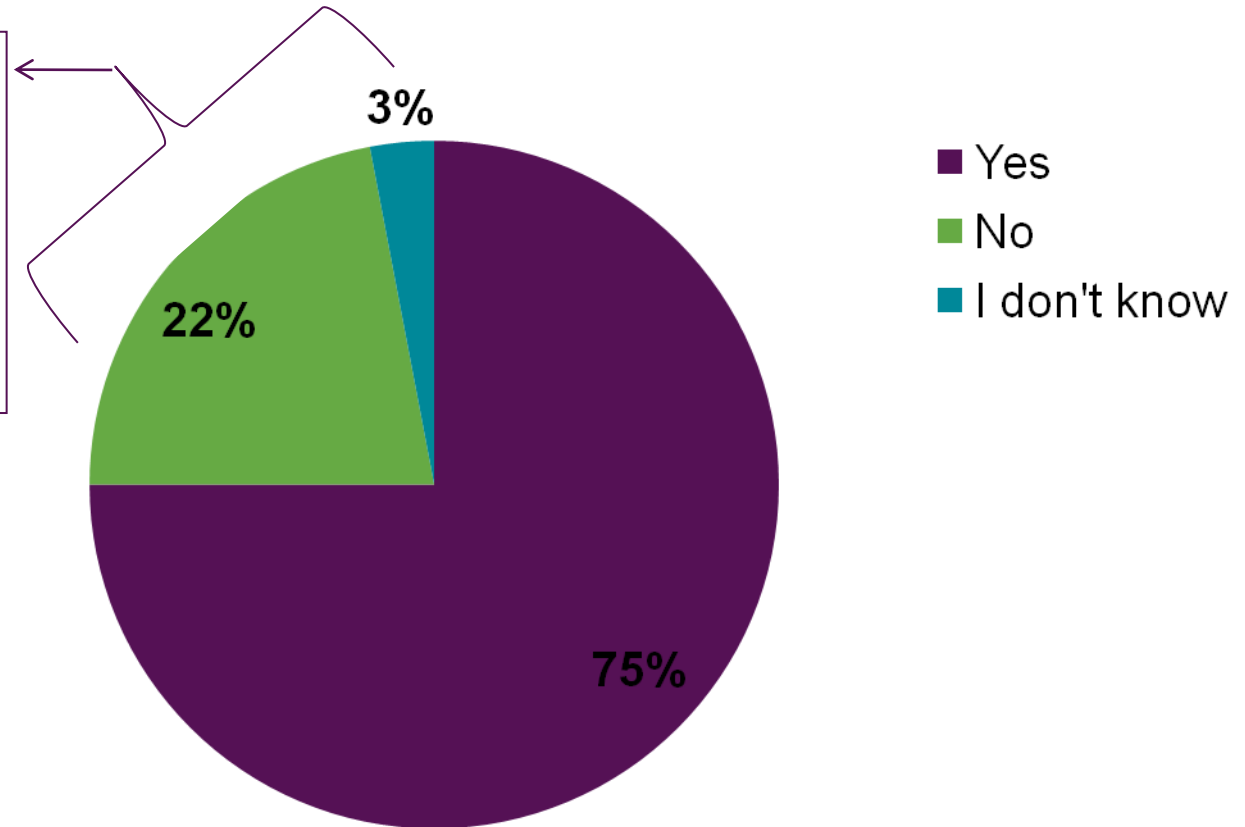


Do you have the ability to contact colleagues from any place at any time or from any device, such as a laptop or mobile device?

# Most Report Having or Wanting the Ability to Access Information from Any Place at Any Time or From Any Device

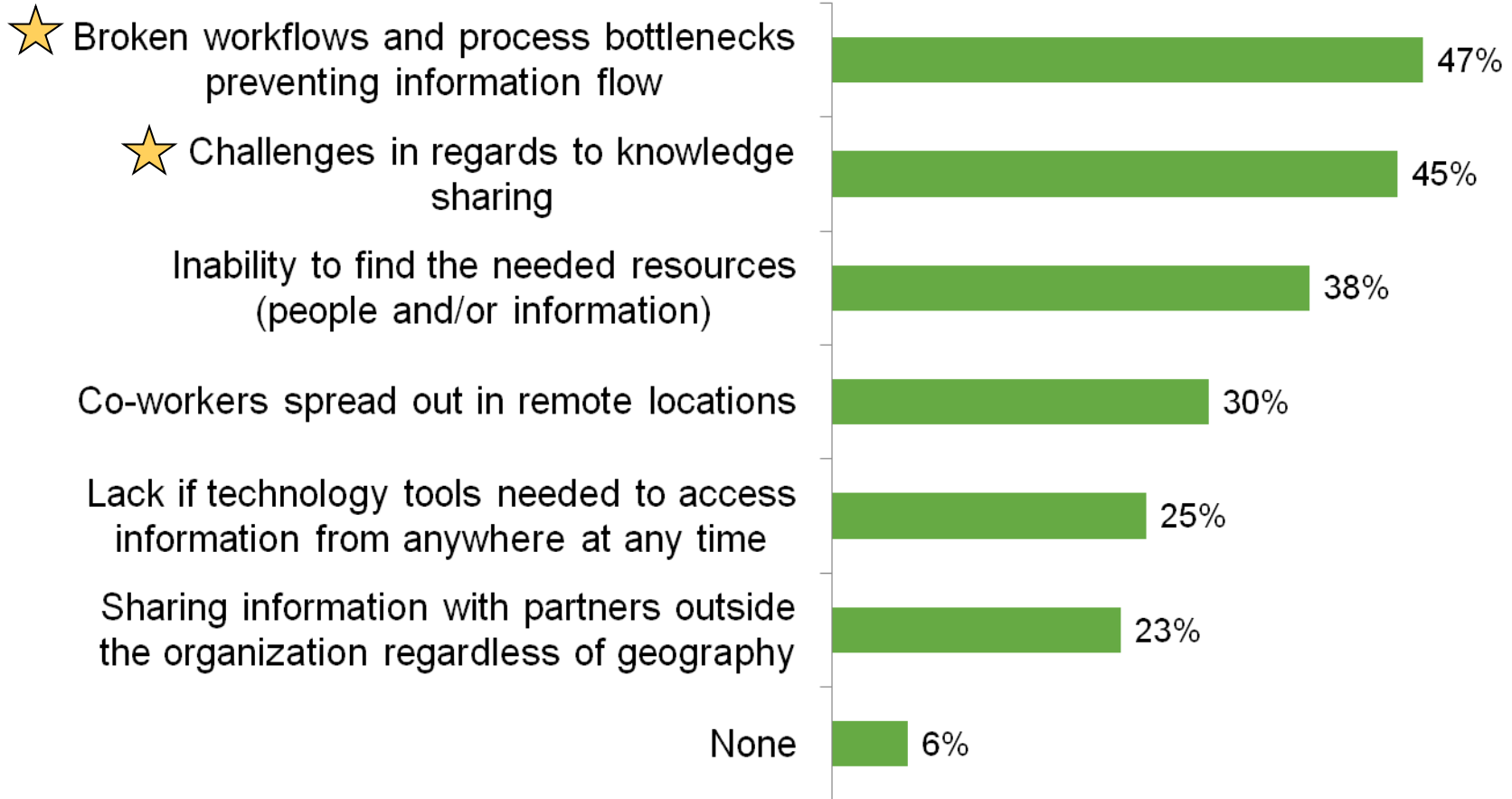


Of the 25% of respondents who do not have or do not know if they have the ability to access information from any place at any time from any device, 80% said that this capability would be very or somewhat valuable.



Do you have the ability to access information from any place at any time or from any device, such as a laptop or mobile device?

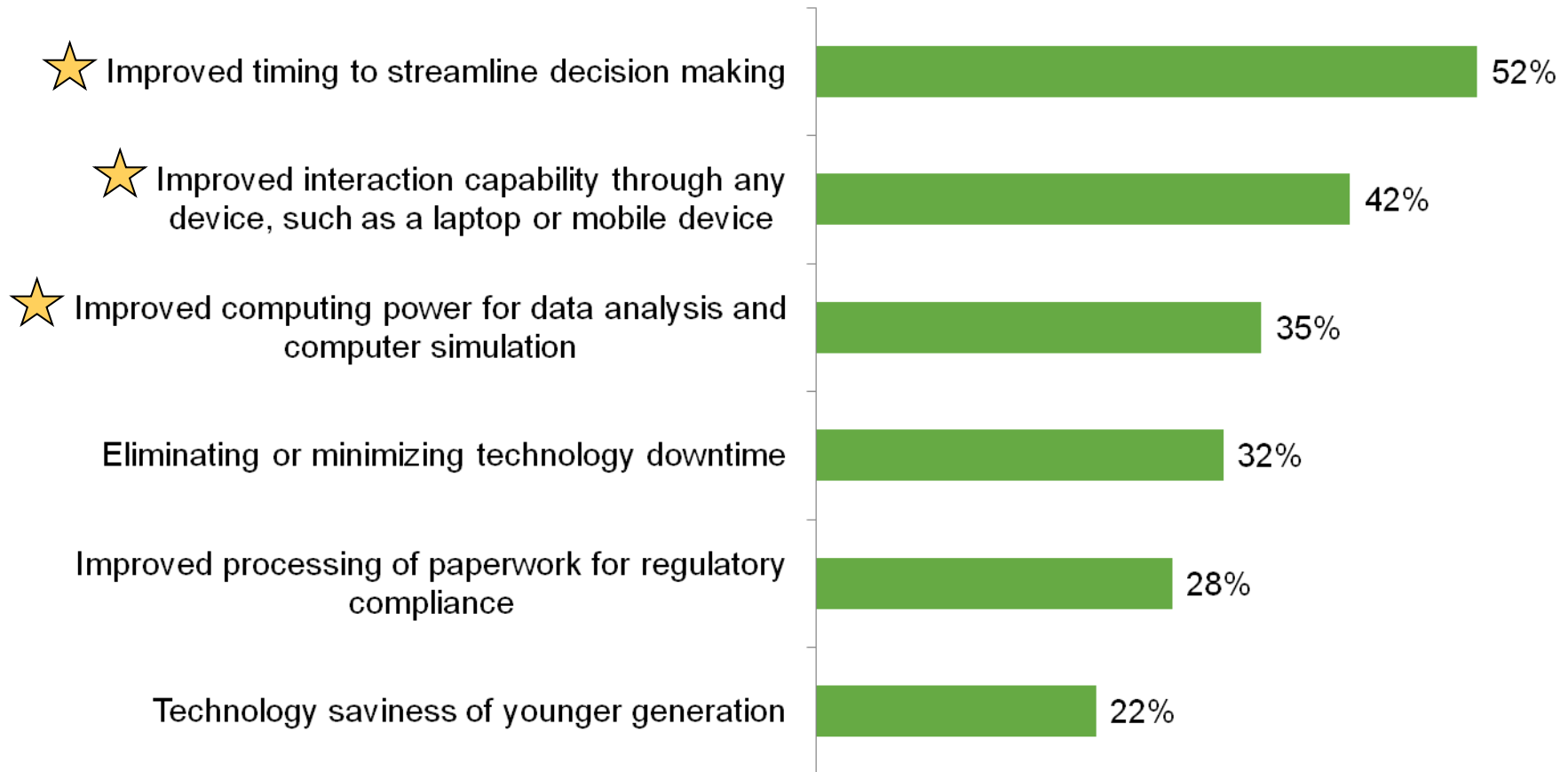
# Challenges Related to Information Flow and Knowledge Sharing are Biggest Barriers to Collaboration



What are the biggest barriers to effective collaboration in your workplace? (Select all that apply.)



# Technology Enhancements that *Improve Timing to Streamline Critical Decision Making* are Needed to Further Company Success



Which of the following technology enhancements would further your company's success? (Select your top three.)