



Skynet Labs Market Research

Title | Skynet Labs Oil & Gas Industry Market Research: Q2 2012

Description | This first market research document from Skynet labs outlines some of the key figures from the Oil & Gas industry. The findings range from global oil & gas exploration and production value to planned expenditure on ICT budgets within the industry. The research conducted confirms the importance placed by the oil & gas industry upon ICT spending as well as the huge market opportunity that Skynet labs' ICT solutions can provide for.

Contact Us:

A | 35a The Factory, Barrow Street, Dublin 2, Ireland

E | info@skynetlabs.com

T | +353 1 685 4415

ICT BUDGET WITHIN THE OIL & GAS INDUSTRY

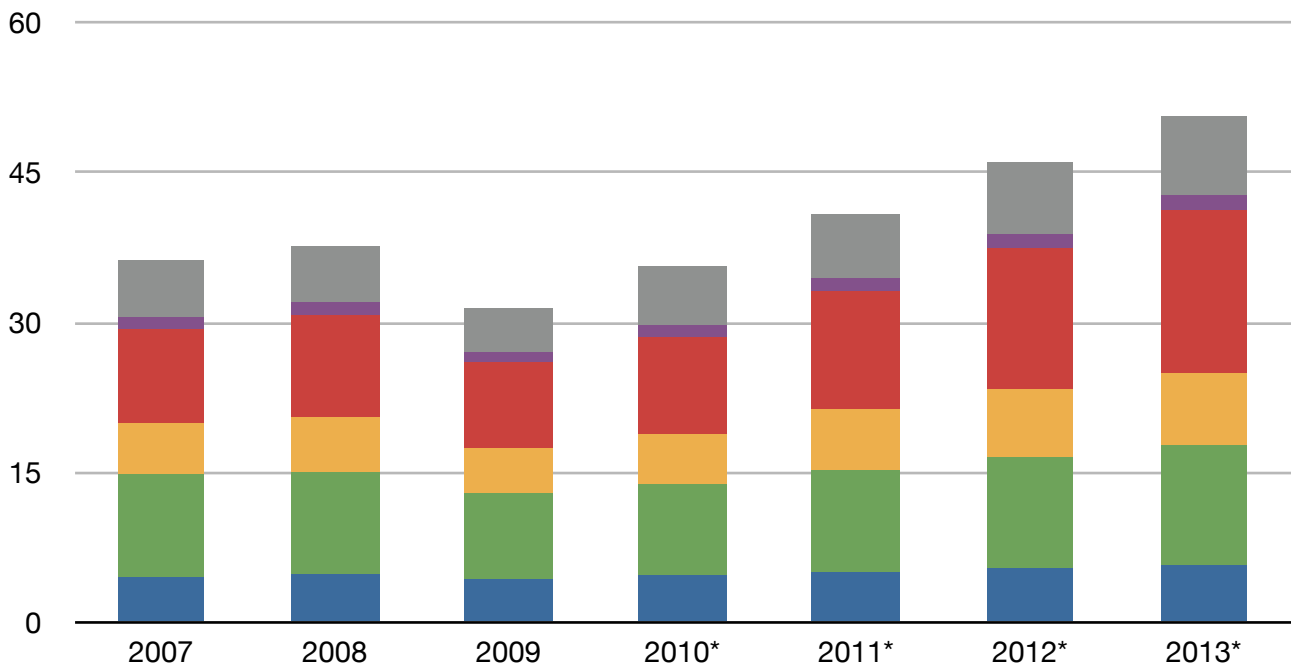


FIGURE 1

	Telecom Services	IT Outsourcing Services	IT Consulting Services	Software	Communications Equipment	Computer & Peripherals Equipment	Total ICT Purchases
2007	23%	11.20%	28%	35%	37.70%	35%	25%
2008	8.80%	-1.50%	8.40%	8.10%	10.80%	-1.30%	4.10%
2009	-11.80%	-15.60%	-18.70%	-15%	-19.60%	-21.70%	-16.50%
2010*	8.90%	5.60%	11%	11.90%	11.70%	33.50%	12.70%
2011*	7.90%	12%	23.40%	22.40%	8.30%	9.80%	15.40%
2012*	7.70%	9%	11%	19.20%	8.80%	11.80%	12.50%
2013*	4.50%	8.50%	6.20%	16.10%	7.70%	9.20%	10.10%

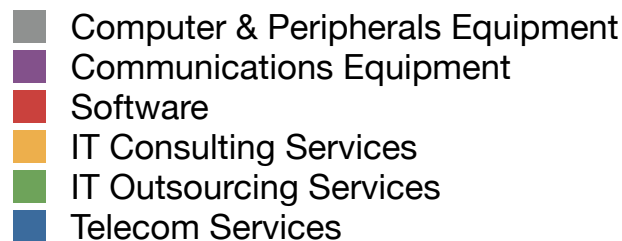


TABLE 1: * forecasted figures

ICT BUDGET SPENDING FOCUS: A SURVEY

Q: “How do you expect your spending on the following software, hardware/infrastructure, IT services, & IT project categories to change in 2012 compared with 2011?”

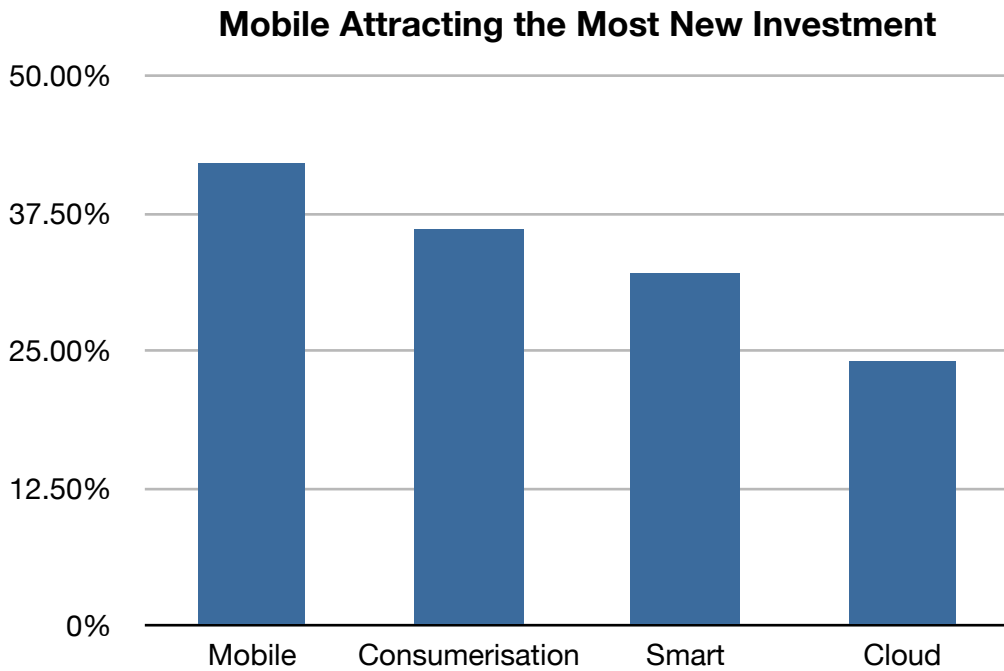


FIGURE 2

The data bars represent the % of firms reporting planned increases of 5% or more for technologies & services under each category

Regional Differences Exist, but Mobile Still Ranks Highest

Region	Mobile	Consumerisation	Smart	Cloud
North America	24%	32%	36%	42%
Europe	23%	32%	37%	48%
Latin America	24%	31%	36%	47%
Asia Pacific	33%	41%	45%	47%
Russia	24%	29%	35%	35%

TABLE 2

OIL & GAS INDUSTRY OUTLOOK OVER THE NEXT 12 MONTHS

Q: "How would you rate your industry's business outlook on a scale of 1 [very challenging] to 4 [very positive] over the next 12 months?"

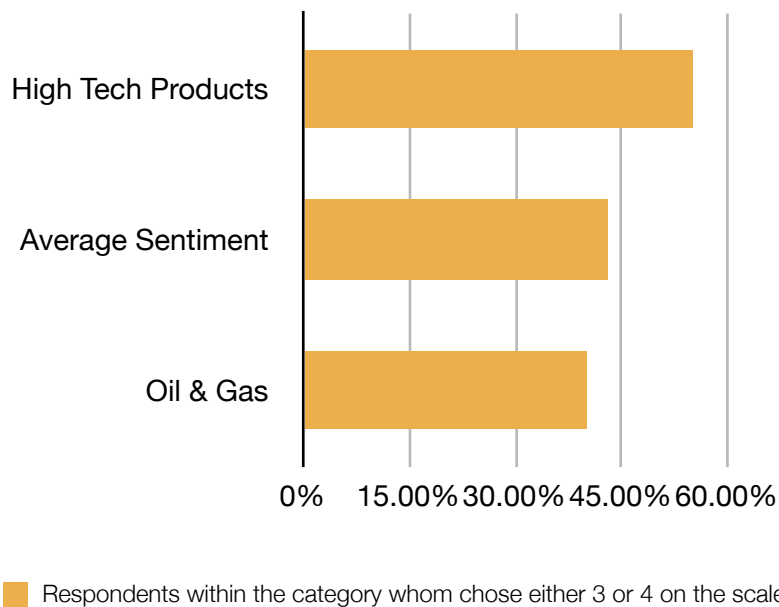


FIGURE 3

Q: "What are your company's three most important industry priorities?"

High-tech Products

Response	%
Grow our market share through leading innovation	70%
Help customers tighten the connection between technology capabilities and business value	57%
Expand presence or move into emerging markets	42%

TABLE 3

Oil & Gas

Response	%
Increase Production Efficiency	70%
Expand presence or move into emerging markets	55%
Meet regulatory and environmental compliance	55%

TABLE 4

IT EXPENDITURE BY EMPLOYEE

Q: "In 2011 on average, how much (\$), will your company spend on IT per employee?"

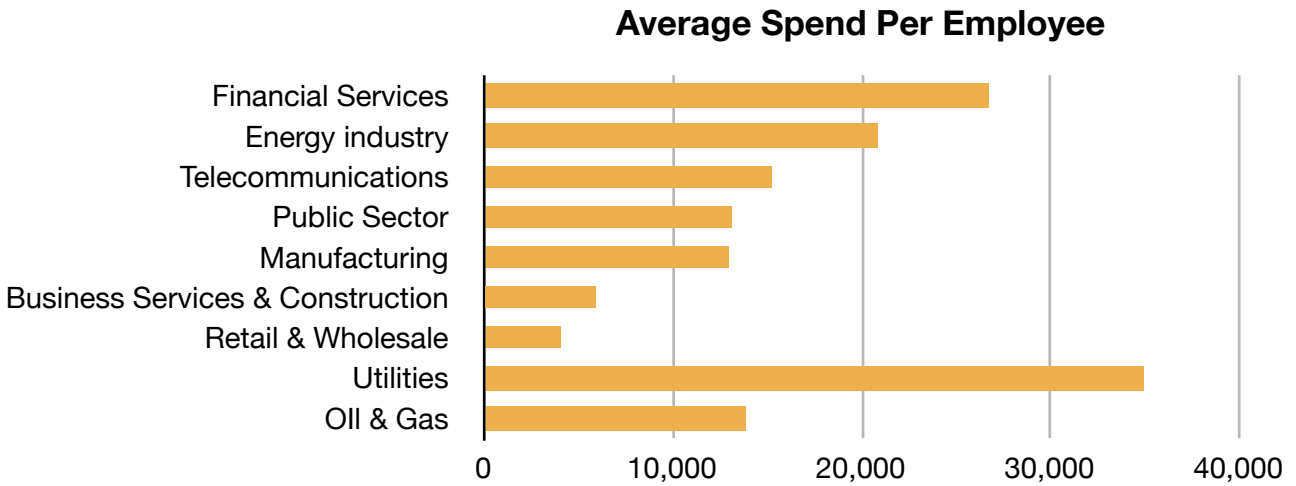


FIGURE 4

GLOBAL OIL & GAS EXPLORATION & PRODUCTION VALUE

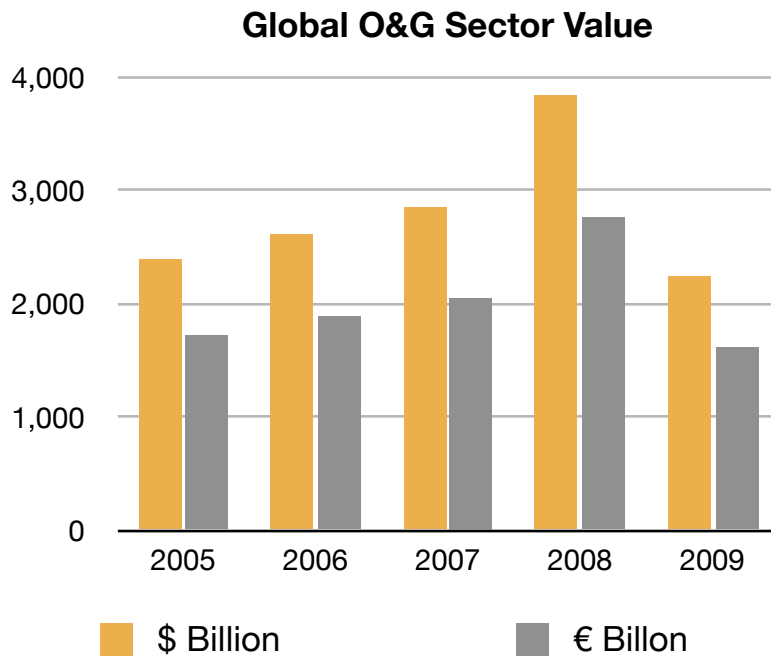


FIGURE 5

	2005-2006	2006-2007	2007-2008	208-2009
% Growth	9.20%	9.20%	34.60%	-41.70%

TABLE 5

Segments of the Exploration & Production Sector

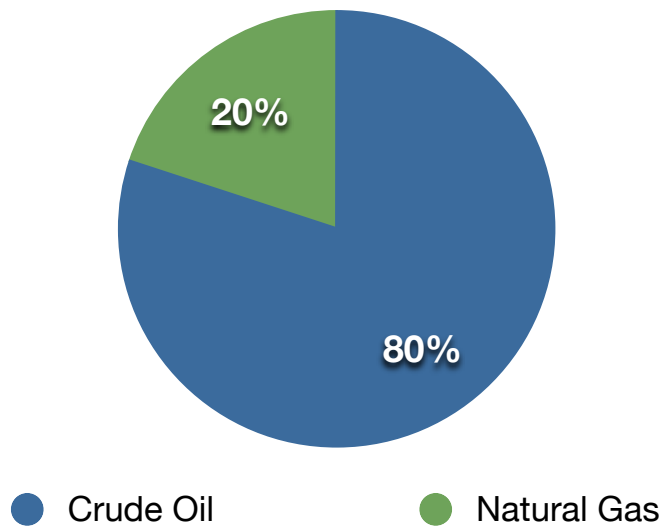


FIGURE 6

TABLE 6:

	2009
Crude Oil	1,790.7
Natural Gas	446.5

APPENDIX

The figures and tables within this document are cited from the following official research centers:

- Figure 1 Global Oil & Gas ICT Budget Spending (US\$ billions)
Source: Forrester Research, Inc.
- Table 1 Global Oil & Gas ICT Budget Spending (US\$ billions)
Source: Forrester Research, Inc.
- Figure 2 Forrsights Budgets & Priorities Tracker Survey Q4 2011
Source: Forrester Research, Inc.
- Table 2 Forrsights Budgets And Priorities Tracker Survey, Q4 2011
Source: Forrester Research, Inc.
- Figure 3 Forrsights Budgets & Priorities Tracker Survey Q4 2011
Source: Forrester Research, Inc.
- Table 3 Forrsights Budgets & Priorities Tracker Survey Q4 2011
Source: Forrester Research, Inc.
- Figure 4 Forrsights Software Survey, Q4 2011
Source: Forrester Research, Inc.
- Table 4 Forrsights Budgets & Priorities Tracker Survey Q4 2011
Source: Forrester Research, Inc.
- Figure 5 Global oil & gas exploration & production sector category segmentation: \$bn, 2009
Source: MarketLine
- Table 5 Global oil & gas exploration & production sector category segmentation: \$bn, 2009
Source: MarketLine
- Figure 6 Global oil & gas exploration & production sector category segmentation: \$bn, 2009
Source: MarketLine
- Table 6 Global oil & gas exploration & production sector category segmentation: \$bn, 2009
Source: MarketLine