

Oil and Gas Industry – Services and Solutions

A research report comparing provider strengths,
challenges, and competitive differentiators



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The oil and gas industry involves the exploration and refinement of oil and gas deposits to produce intermediate and end products. Key segments of the industry include upstream (exploration and production), oilfield services (equipment and drilling services), midstream (transportation and storage) and downstream (refining and retail markets). The industry comprises of national oil companies (NOCs), integrated oil and gas companies (majors), and independent oil and gas companies.

The study is aimed at understanding oil and gas companies' requirements for the digital age and service provider capabilities in meeting these demands.

Oil and gas prices continue to rise due to the decline in global oil inventory, demand increases, and rising geopolitical tensions, leading to significant disruptions in production. Ukraine crisis further escalated market concerns about

the possibility of oil and gas supply disruptions. Changes in production targets from the OPEC+, continuing technical issues among producers, and changing investment decisions of U.S. tight oil operators may also impact production in the near to mid-term.

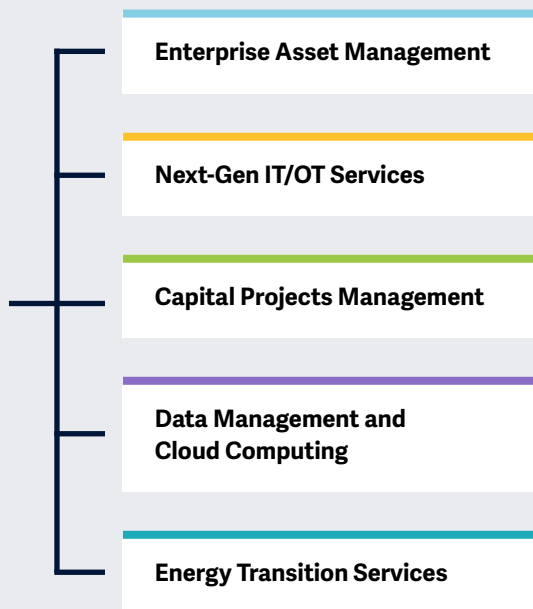
The oil and gas industry has identified energy transition as a key focus area for 2022 and beyond. Many companies have been transforming their portfolios by replacing maturing legacy assets with low-carbon resources.

These companies are increasingly geared toward digital innovation and operational efficiency through the adoption of cloud, AI, machine learning, mobility, automation, and operational technology (OT) security. However, they face challenges around oil price volatility, worker safety, data and information access, remote asset monitoring etc.



Key focus areas for Oil and Gas Industry – Services and Solutions 2022

Simplified Illustration Source: ISG 2022



The ISG Provider Lens™ study offers oil and gas companies' business and IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- A view of the global services market with a focus on North America (U.S. and Canada), the U.K. and the Nordics

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Enterprise Asset Management (EAM)

Definition

This quadrant assesses service providers that offer EAM services and solutions to clients in the oil and gas industry. The services cover asset lifecycle management, maintenance, repairs, and overhauls (MRO), labor management, control management, application maintenance and support, supply chain solutions, cloud services, asset health management, geospatial information system (GIS), digital enablement service and remote monitoring. These services enable companies to increase asset performance, extend useful life and reduce operational costs.

Eligibility Criteria

1. Exposure of **working in EAM for clients** in the oil and gas industry in the country or region
 - * MRO management
 - * Controls management
 - * Warranty management
 - * Geographic information system (GIS)
 - * Digital EAM solutions
 - * Analytics and reporting
2. Should have **successful EAM-related engagements** (in the past or present) with at least three oil and gas companies
3. **Provide offerings and services** in at least four of the following areas related to EAM:
 - * Asset health management
 - * Failure prediction
 - * Work and labor management
 - * Inventory management
4. Demonstrate **strong partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in the oil and gas industry
5. Offer **referenceable oil and gas case studies** for various services and solutions across the value chain



Definition

This quadrant assesses service providers that offer IT-managed services in the oil and gas industry. The offerings cover infrastructure services, application development and maintenance (ADM) services, IoT-based solutions, cybersecurity solutions, remote monitoring, digital twins, advanced analytics, VR and AR, etc. They help clients to increase efficiency, ensure compliance and minimize overall costs. The IT/OT convergence is gaining prominence in the oil and gas industry. The combination of IT and OT will help companies with insights that they can use to mitigate operational problems.

Eligibility Criteria

1. Ability to **offer a combination (if not all) of the following IT/OT services** to companies in the oil and gas industry value chain, with local expertise in the assessed region or country:
 - * Systems integration
 - * Applications development and maintenance (ADM)
 - * Infrastructure services (data center, network operations center, cloud etc.)
 - * Cybersecurity solutions
 - * Next-gen technology services and solutions such as automation, analytics, AI, machine learning, IoT, and blockchain
 - * ERP migration and hosting services
2. Possess **extensive domain knowledge of the oil and gas industry** and local or regional regulatory and compliance requirements
3. Hold **strong partnerships with industry** associations, regulatory bodies, technology firms, and startups specializing in the oil and gas industry
4. Experience in **large transition projects** that include post-merger integration companies, IT/OT-driven business transformation, cybersecurity, and modernization of legacy systems etc.
5. Offer **referenceable case studies** for various services and solutions across the value chain



Definition

This quadrant assesses service providers that offer CPM services and solutions to clients in the oil and gas industry. The services include capital portfolio and project management, enterprise capital transformation, contracts management, procurement management, advanced analytics, cost management, capital projects model design, capital projects excellence and digital twins. They enable companies to control complex, capital-intensive projects and help them deliver these projects on time and on budget.

Eligibility Criteria

1. Exposure of **working in CPM for clients** in the oil and gas industry in the country or region
 - * Advanced analytics and reporting
 - * Cost management
 - * Capital projects op model design
2. Should have **successful CPM-related engagements** (in the past or present) with at least three oil and gas companies
 - * Capital projects excellence
 - * Digital twins
3. Provide **offerings and services in at least one of the following areas** related to CPM:
 - * Capital portfolio and project management
 - * Enterprise capital transformation
 - * Contracts management
 - * Procurement management
4. Demonstrate **strong partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in the oil and gas industry
5. Offer **referenceable oil and gas case studies** for various services and solutions across the value chain



Definition

This quadrant assesses service providers that offer data handling and cloud services for oil and gas companies across various segments. The services include cloud data and process, transition, storage, application, master data management, etc. They help enable the centralization of data and processes and transition from legacy systems.

Eligibility Criteria

1. Ability to **offer a combination (if not all) of the following IT services** to the companies in the oil and gas space across the industry value chain with local expertise in the assessed region or country:
 - * Connected worker
 - * Data management, analytics and governance
 - * Cloud adoption, data storage and security
 - * Data visualization and transformation
2. Showcase **extensive domain knowledge of the oil and gas industry** and local or regional regulatory and compliance requirements
3. Demonstrate **strong partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in the oil and gas industry
4. Experience in **large transition projects** that include post-merger integration companies, IT-driven business transformation, cybersecurity, and modernization of legacy systems and applications in the oil and gas industry
5. Offer **referenceable case studies** for various services and solutions across the value chain



Definition

This quadrant assesses providers that offer a range of energy transition services to oil and gas companies across the world. The services are aimed at net-zero connected energy products and services and energy networks. Energy transition services and solutions help oil and gas companies achieve their net-zero carbon transition targets, implement energy efficiency initiatives, and drive new business models for the evolving energy ecosystem.

Eligibility Criteria

1. Ability to **offer below mentioned energy transition services** to oil and gas companies in one or more areas across the value chain, with local expertise in the assessed region or country:
 - * Digital energy transition
 - * Analytics
 - * Climate risk management
 - * Health and environmental services
 - * Emission management and reporting
2. Demonstrate **deep domain knowledge of oil and gas industry**, local regulatory and compliance requirements
3. Experience in **optimizing business processes** and helping oil and gas companies in their energy transition journeys
4. Demonstrate **knowledge of how to leverage emerging technologies** including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
5. Has established or **emerging partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in the oil and gas industry
6. Offer **referenceable case studies** for the industry showcasing strengths and capabilities



Quadrants By Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants for the study, Oil and Gas Industry – Services and Solutions 2022.

Quadrant	North America	U.K.	Nordics
Enterprise Asset Management	✓	✓	✓
Next-Gen IT/OT Services	✓	✓	✓
Capital Projects Management	✓	✓	✓
Data Management and Cloud Computing	✓	✓	✓
Energy Transition Services	✓	✓	✓



The research phase falls in the period between August and September 2022, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in Jan 2023.

Milestones

Beginning

End

Survey Launch

August 8, 2022

Survey Phase

August 8, 2022

September 6, 2022

Sneak Preview

November 2022

Press Release & Publication

Jan, 2023

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2022 research agenda

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!



ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments. To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com



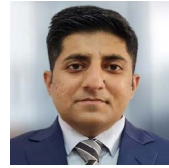
Contacts For This Study



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**Lead Analyst
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**Mohd Aves
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**Lead Analyst
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**Hemant Kumar
Chandak**
Research Analyst



**Monika
Kathuria**
**Group Project
Manager**



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT).

The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as

part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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**Victor
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**Market Leader –
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ISG Advisors to this study



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Coumans

**Principal
Consultant – UK**



Ola
Chowning

**Partner – North Europe
Lead**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Accenture

Adi Analytics

Alten

Arcadis

ARMS Reliability

Asseco Group

Atos

Avanade

AVEVA

Basefarm

Bell Energy

Bentley Systems

BJSS

Birlasoft

BonitaSoft

BP Logix

Brillio

Bursys

Capgemini

Carbon-Zero

Centric Consulting

CGI

Cisco Systems

Coeus Consulting

Coforge

Cognizant

Computacenter

Coupa Software

Cyient

Dassault Systemes

Data Gumbo

Deloitte

Detection Technologies

DNV

DXC Technology

Elixirr

EnergySys

Enzen Technologies

EPAM Systems

Exela Technologies

EY

FMIS

Fujitsu

GE Digital

Genpact

GEP

Global Logic

Hansen Technologies

Happiest Minds

HCL

Hiber

Hitachi Vantara

IBM

Idox PLC

IFS AB

Infor Inc

Infosys

Kongsberg Digital

KPMG

LTI



Invited Companies

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LTTS	Perficient	Soltius (YASH Technologies)	Uptake
Lumen	Prolifics UK	SOL-X	Valcon
MedRec Technologies	Protiviti	Sonata Software	Wipro
Mistras	PWC	Sopra Steria	WSP
Mphasis	Quest Global	TatvaSoft	Zensar
Nemetschek	Quorum	TCS	
NNIT A/S	Ramco Systems	Team International	
North Highland	Ranosys	Tech Mahindra	
NTT Data	SAP SE	Tietoevry	
Nutanix	Sapient	Trimble	
OneNeck	Science Soft	T-Systems	
OPC	Seven Lakes Technologies	Ultimus	
Oracle	Siemens Energy	Unisys	
Penspen	Softtek	Unit4 NV	



***ISG** Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

***ISG** Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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***ISG**

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.



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