



Q1 Which of the following best characterises your company?

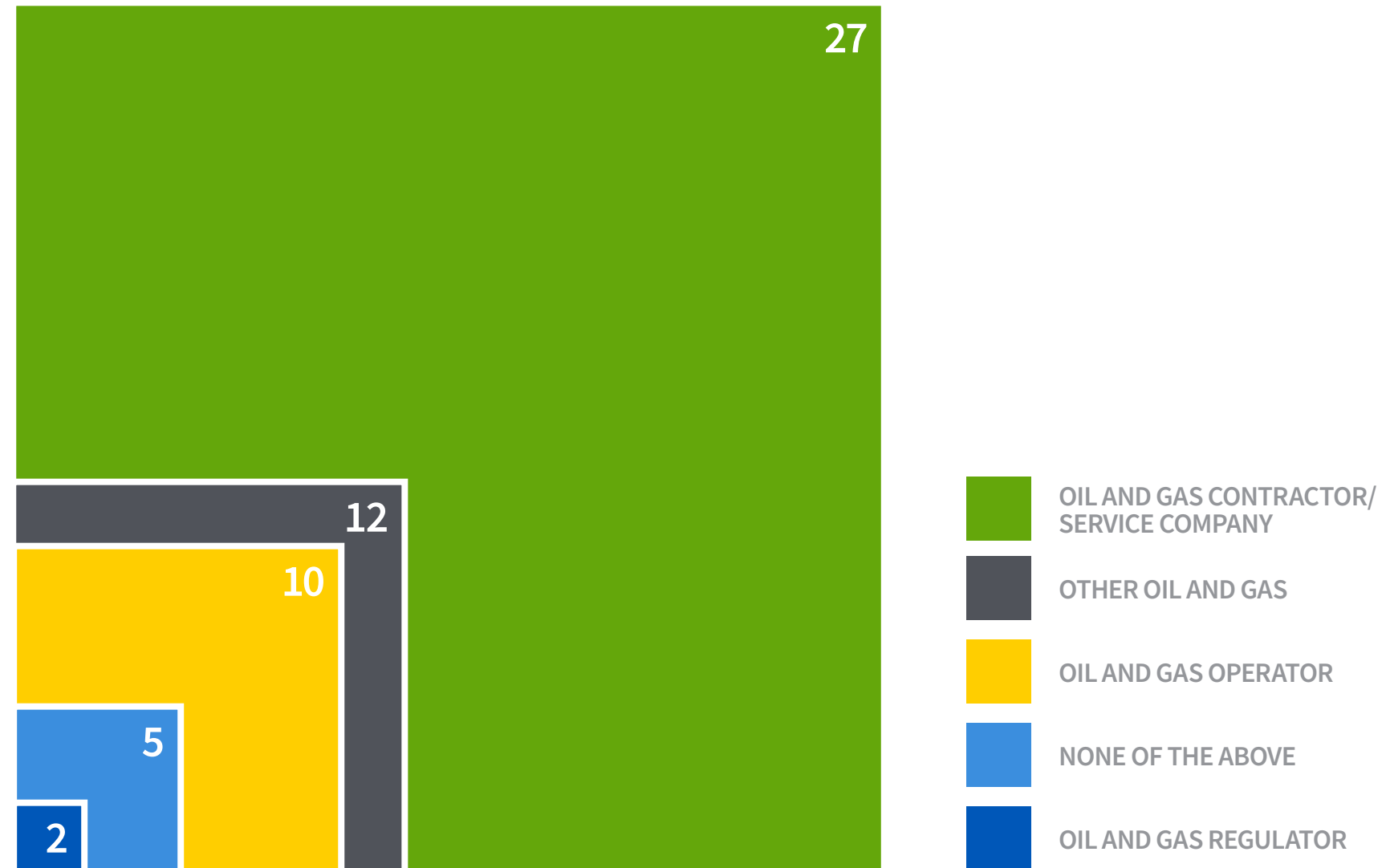
A total of
56
companies were included
in the survey



Q1 Which of the following best characterises your company?

A total of
56
companies were included
in the survey

Company type





Q2 What is the ownership structure of your company?

A total of
56
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in the survey



Q2 What is the ownership structure of your company?

Company ownership

A total of
56
companies were included
in the survey



40
PRIVATELY
HELD

7
PUBLICLY
LISTED

6
STATE
OWNED/
HYBRID
OWNERSHIP

2
OTHER

1
JOINT
VENTURE

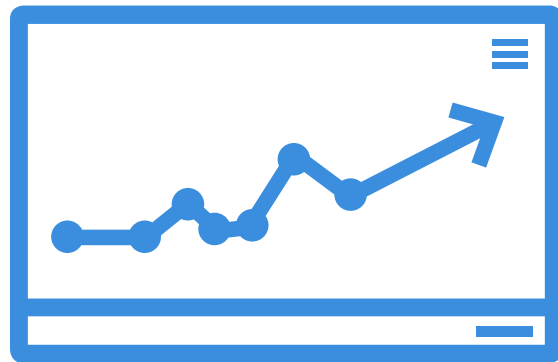


Q3 What is your company's primary driver for investing in innovation?

Q3 Key finding

54%

think operational efficiency
is the primary driver to invest
in innovation



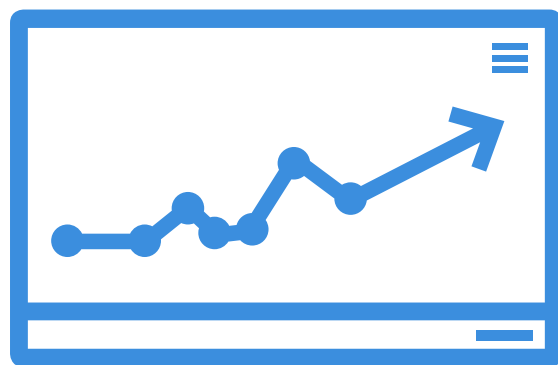


Q3 What is your company's primary driver for investing in innovation?

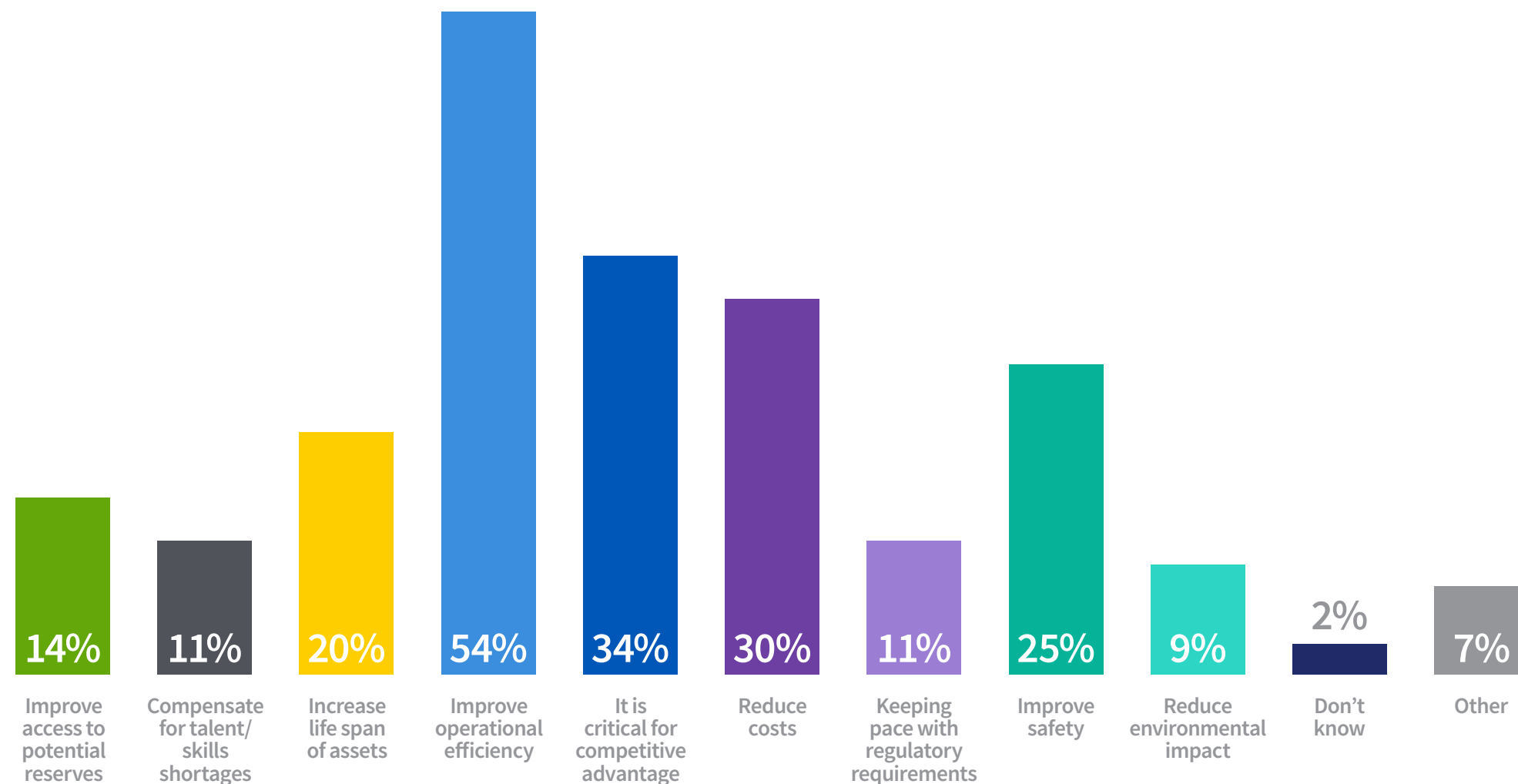
Q3 Key finding

54%

think operational efficiency
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in innovation



Primary drivers



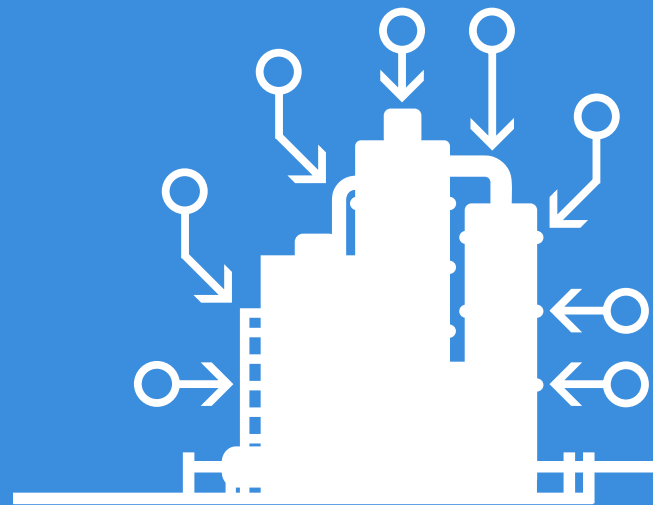


Q4 What are the toughest data challenges your company faces?

Q4 Key finding

45%

saw lack of integration
as the toughest
data challenge

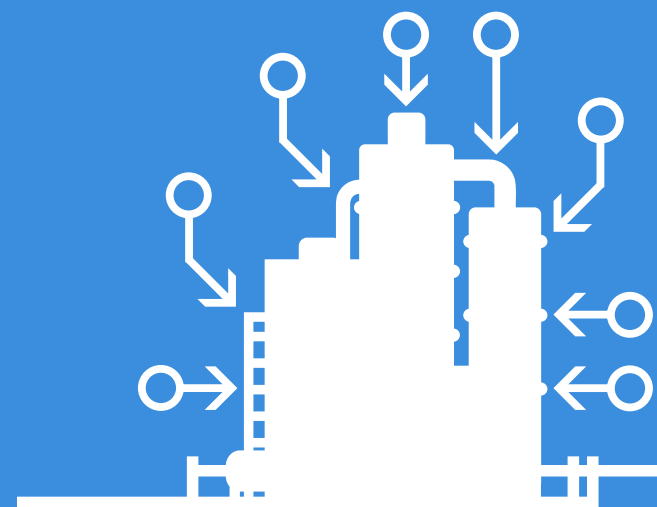




Q4 Key finding

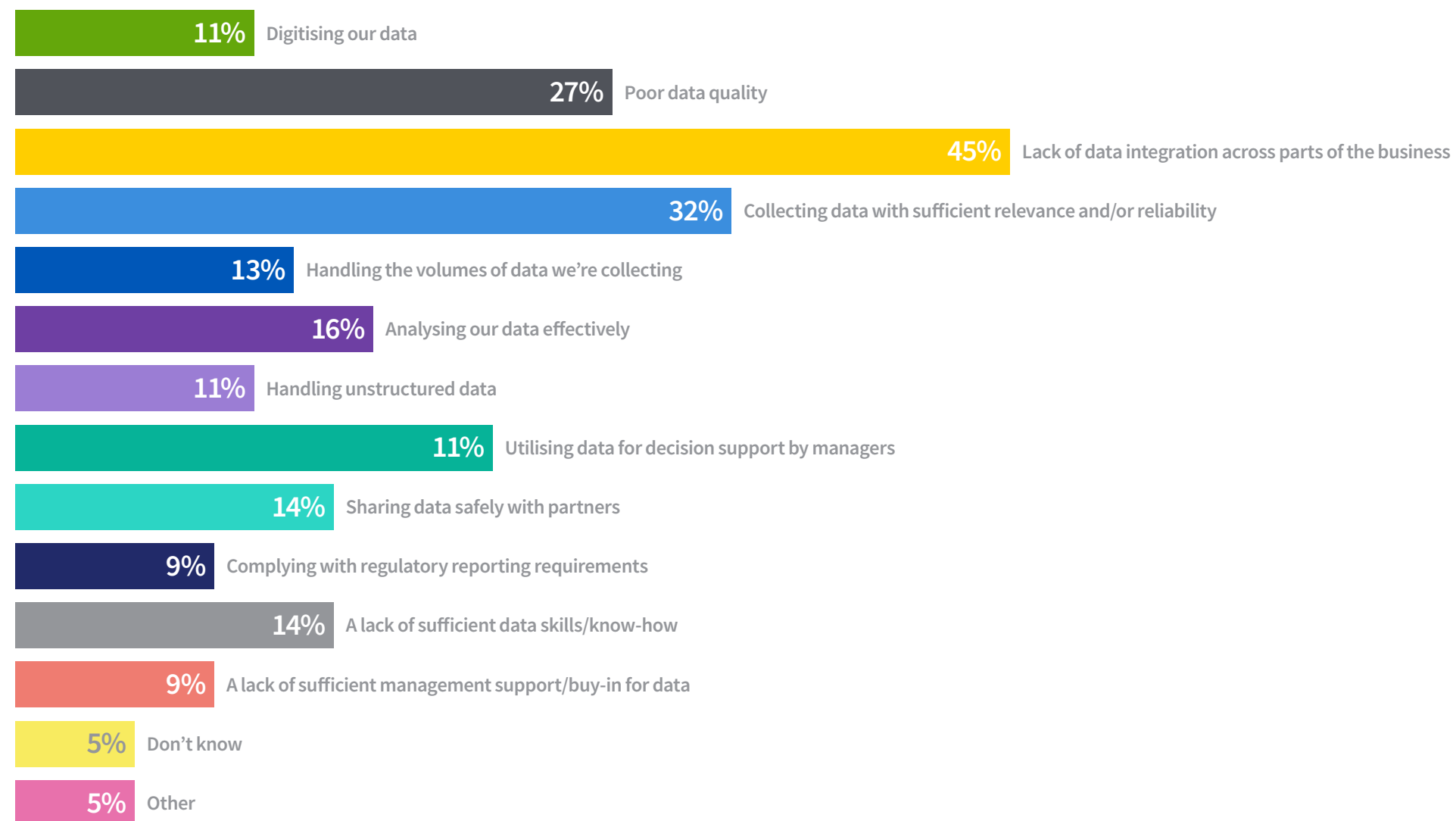
45%

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Q4 What are the toughest data challenges your company faces?

Toughest challenges





Q5 How do you expect the following elements of your company to change over the next two years?

Q5 Key finding

77%

expected volume of data collection to be the biggest change to hit their business





Q5 How do you expect the following elements of your company to change over the next two years?

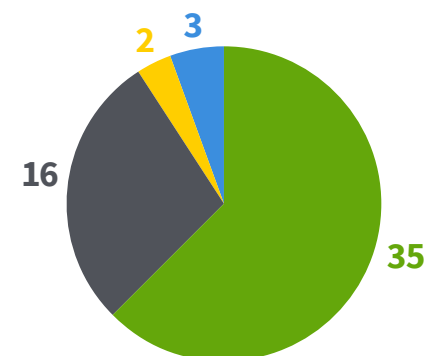
Q5 Key finding

77%

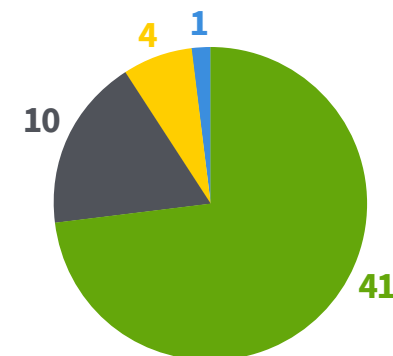
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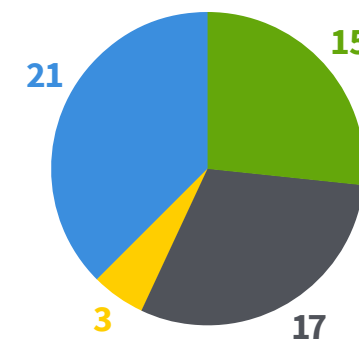
Two year forecast



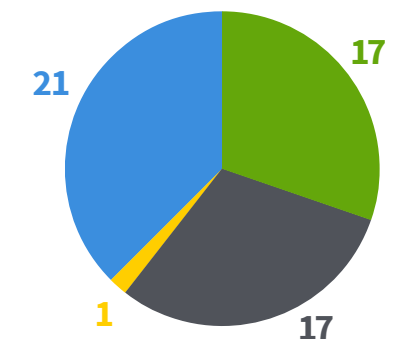
Amount of time spent by management on R&D and innovation



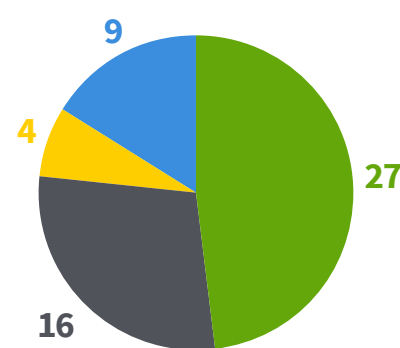
Value of investment in new/emerging technologies



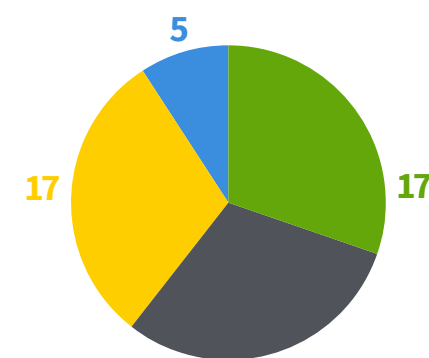
Overall level of proven reserves



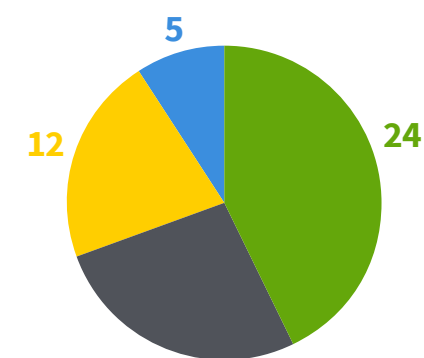
Average recovery rates of proven reserves



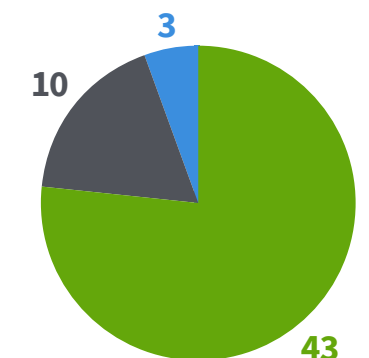
Number of technology-led acquisitions



Average time taken to develop a technology from concept to deployment



Total cost/effort involved in getting a new technology from development to deployment



Volumes of data being collected and analysed

Numbers denote participants, not percentages





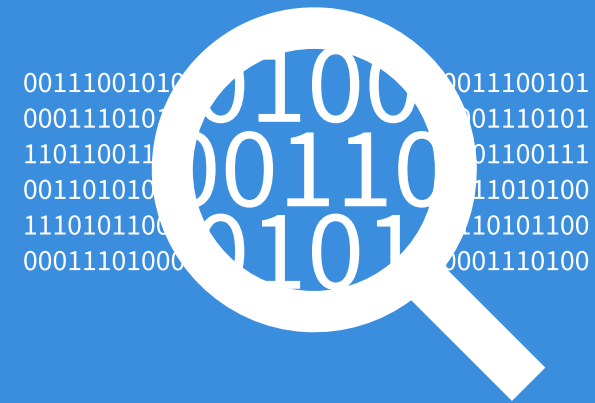
Q6 In your view, how good is your company at collecting and analysing data?

Q6 Key finding

On average

18%

thought they were on top of
data collection and analytics





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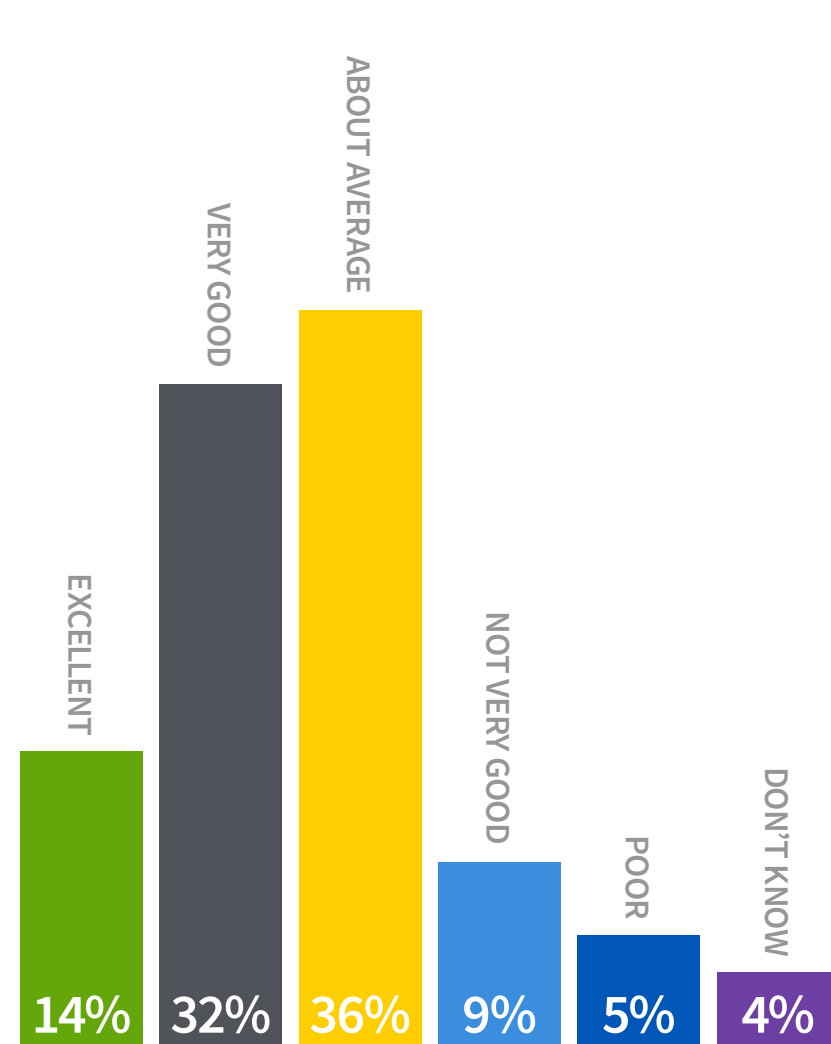
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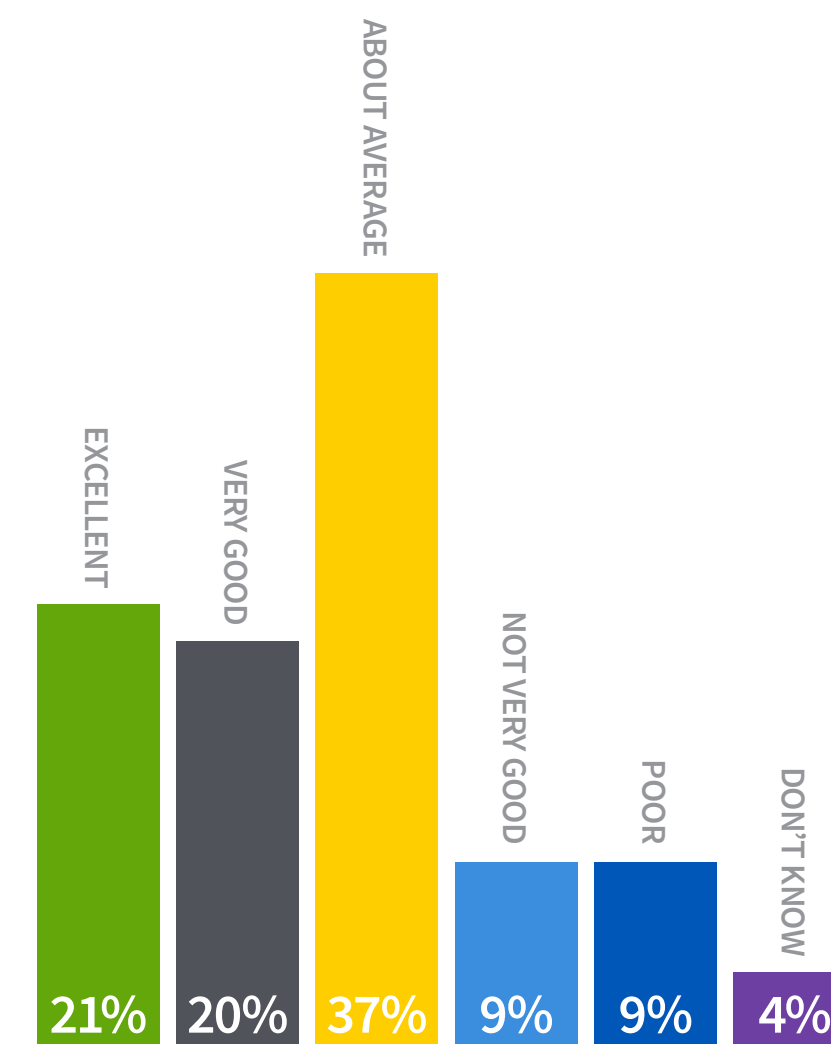
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001110
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01110101
01100111
11010100
110101100
0001110100

Collecting data



Analysing data





Q7 How important will the collection and analysis of data be to your company's overall performance and innovation efforts over the next two years?

Q7 Key finding

On average

49%

regard data collection and analysis to be highly important to their business performance





Q7 Key finding

On average

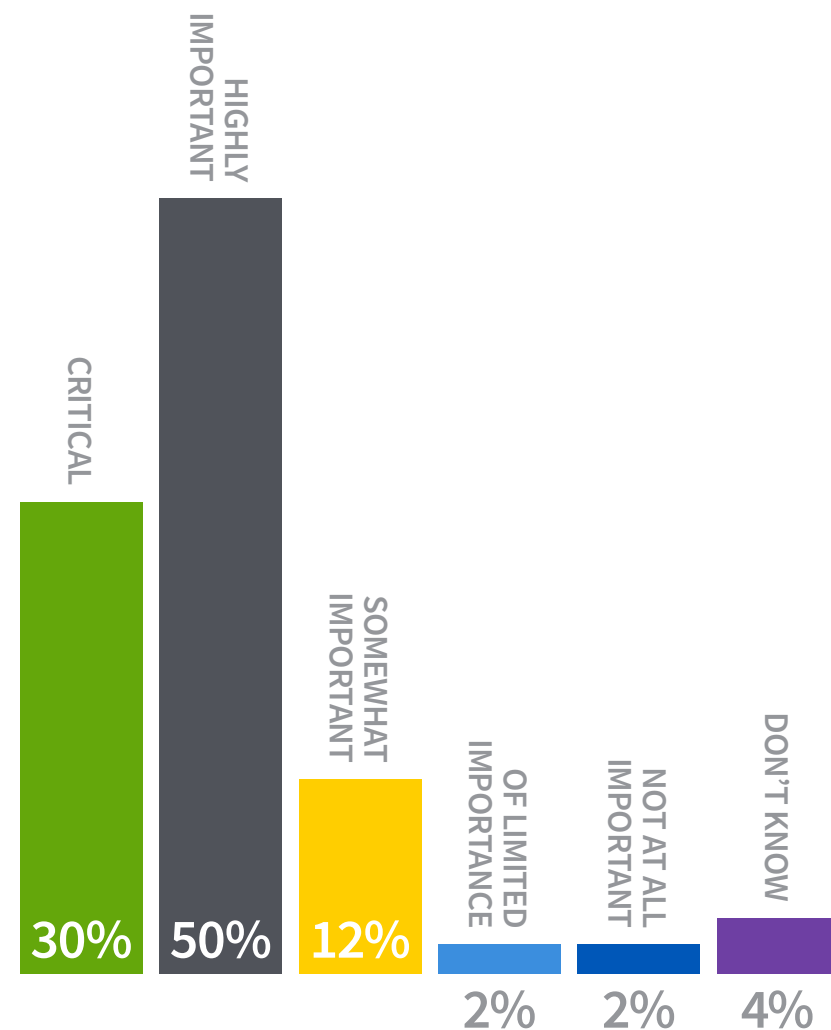
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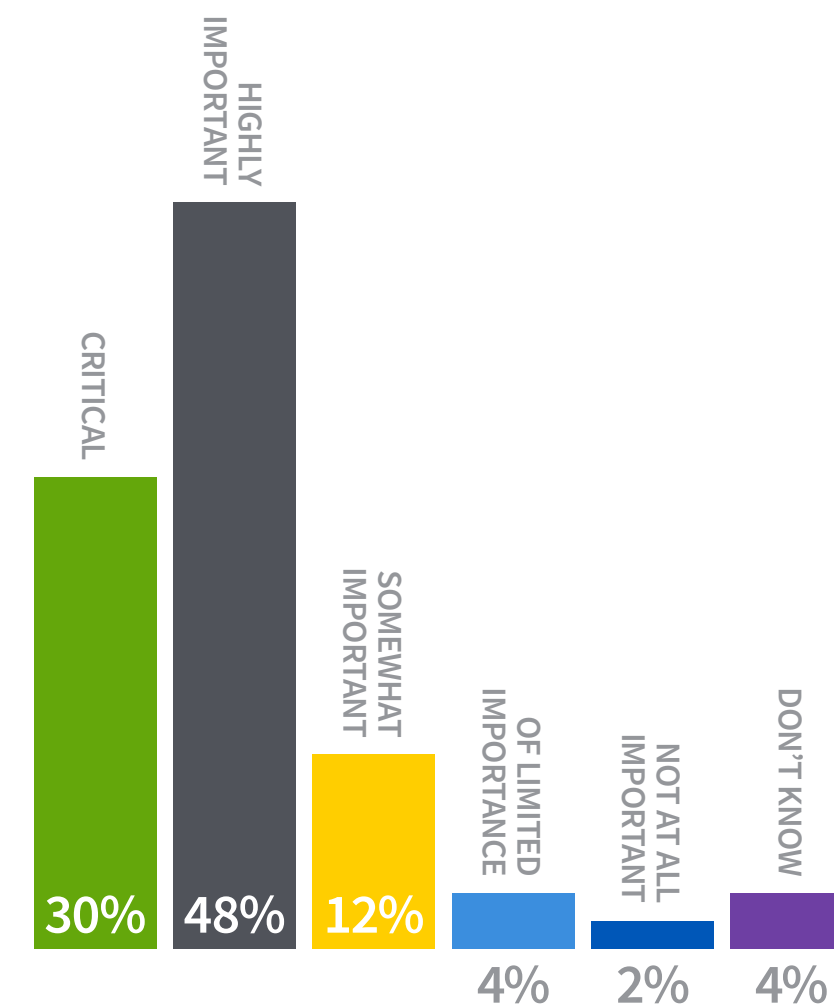


Q7 How important will the collection and analysis of data be to your company's overall performance and innovation efforts over the next two years?

Overall performance



Innovation efforts





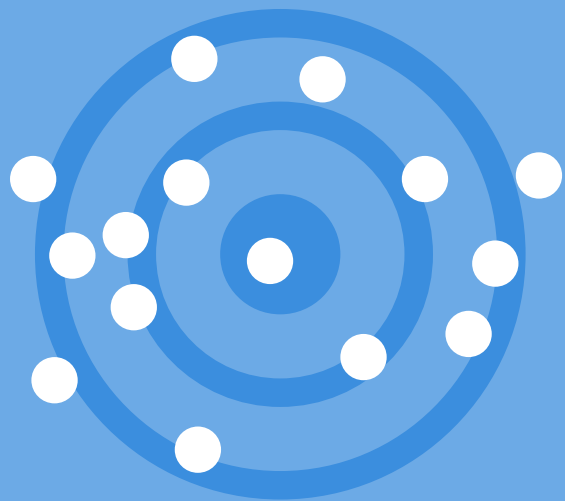
Q8 How successful has your company been at hitting its innovation goals and objectives over the past two years?

Q8 Key finding

A mere

7%

had met or exceeded innovation goals in the last 2 years



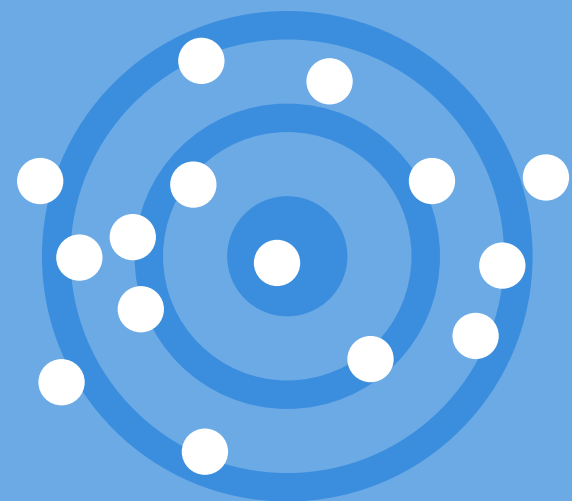


Q8 Key finding

A mere

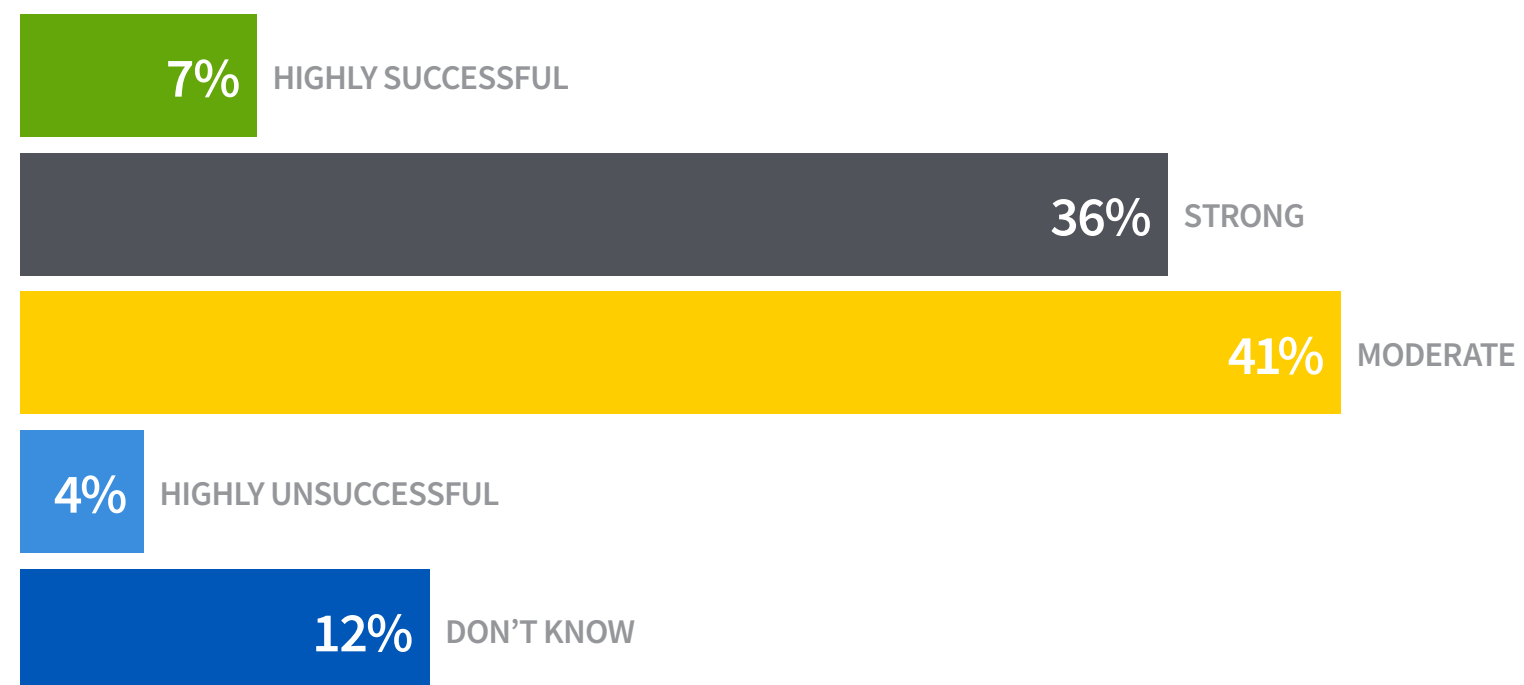
7%

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Q8 How successful has your company been at hitting its innovation goals and objectives over the past two years?

Success rate



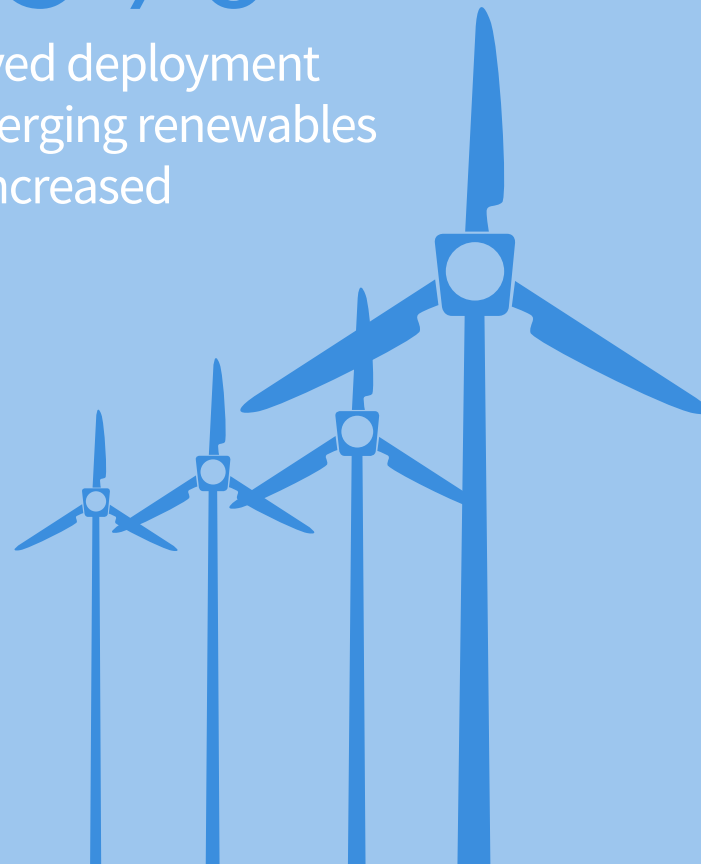


Q9 Over the past two years, how do you believe the scale of deployment in new/emerging renewable technologies has changed in Brasil and South America?

Q9 Key finding

66%

believed deployment
in emerging renewables
had increased



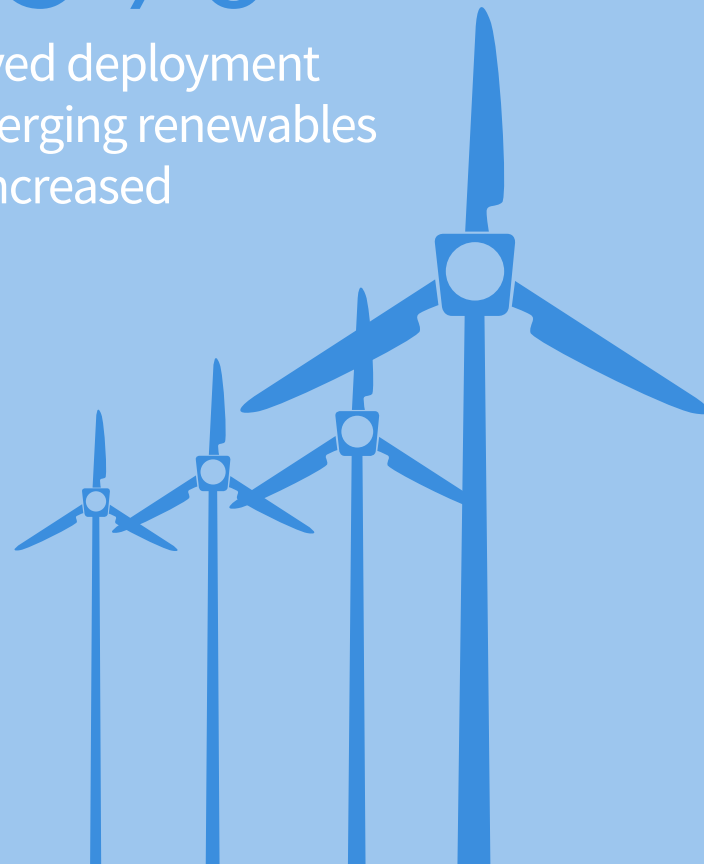


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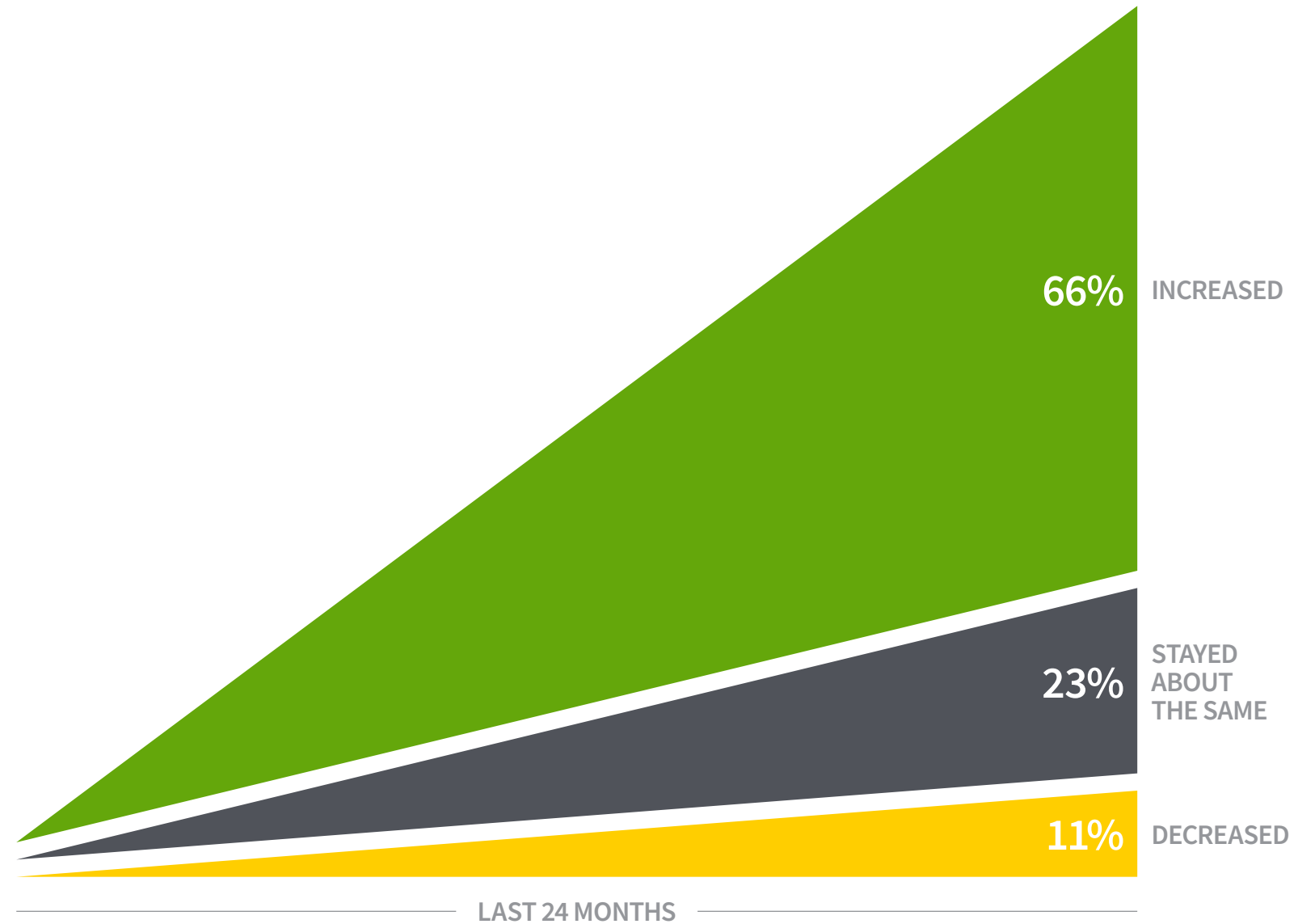
Q9 Key finding

66%

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Perceived scale of change



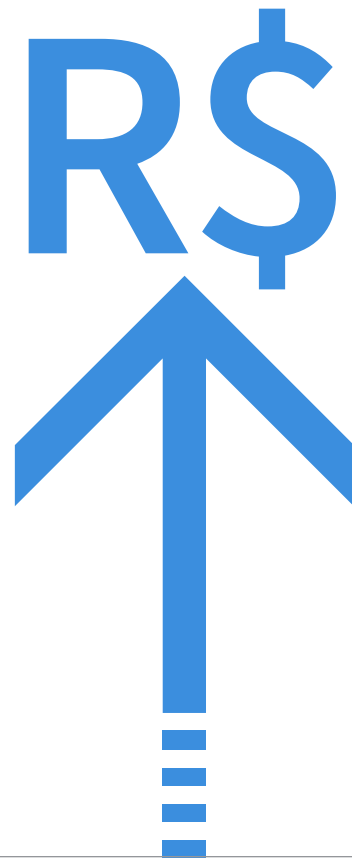


Q10 Please answer the statements below.

Q10 Key finding

41%

agreed high costs were
holding back investment
in renewables in Brasil



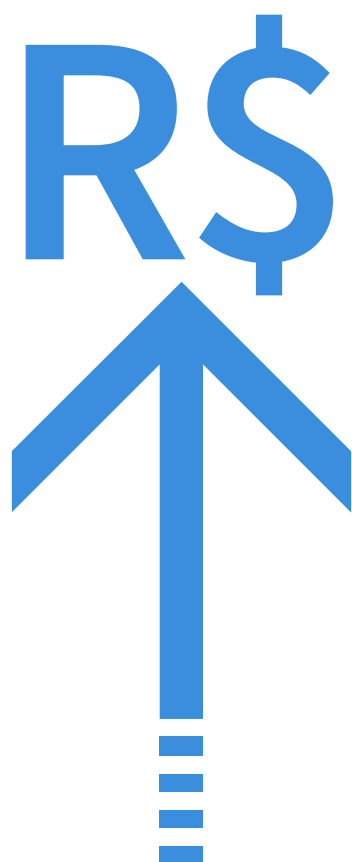


Q10 Please answer the statements below.

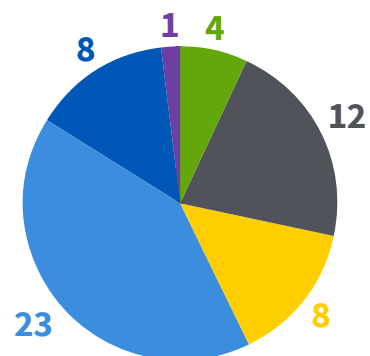
Q10 Key finding

41%

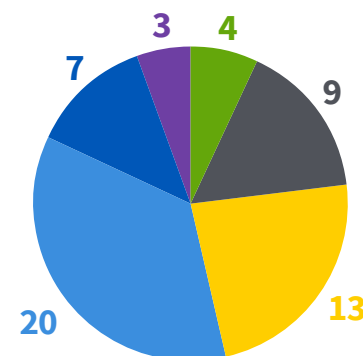
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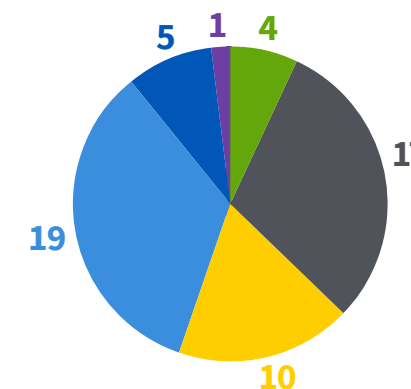
Views on renewables



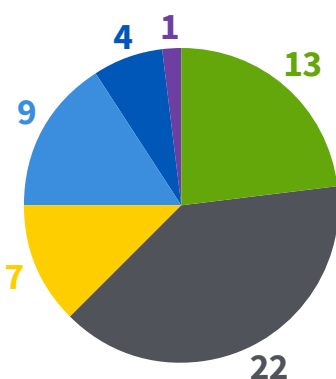
High costs are still the main argument against pursuing renewables in my country



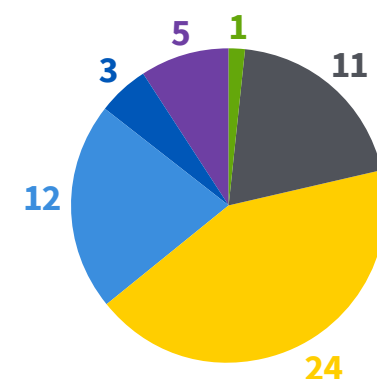
Intermittency of supply is a key issue holding back renewables in in my country



Onshore renewable technologies is a key focus in my country



Offshore renewable technologies is a key focus in my country



The outcome of the COP21 meeting has had a positive impact on my country's attitude towards the adoption of renewable technologies

Numbers denote participants, not percentages





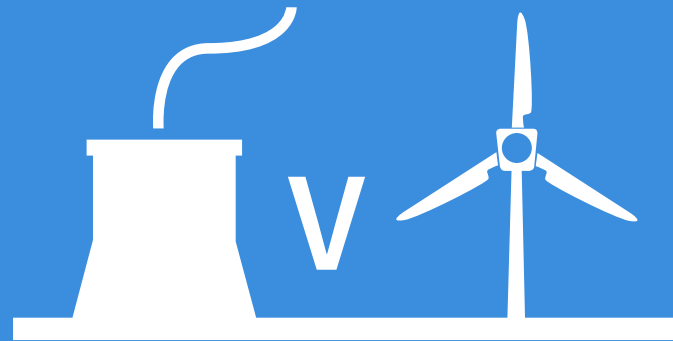
Q11 To what extent do you agree or disagree that renewable energy sources have reached cost parity with fossil fuels across the industry?

Q11 Key finding

Over

60%

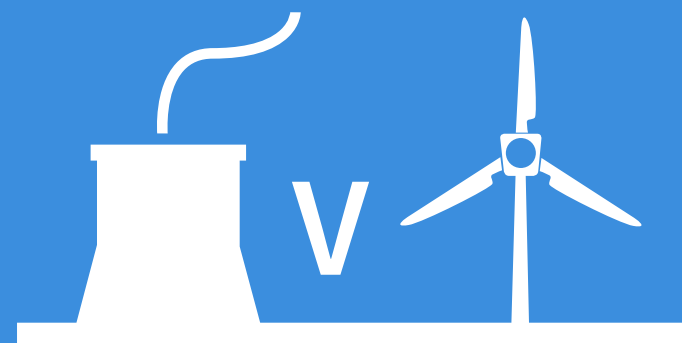
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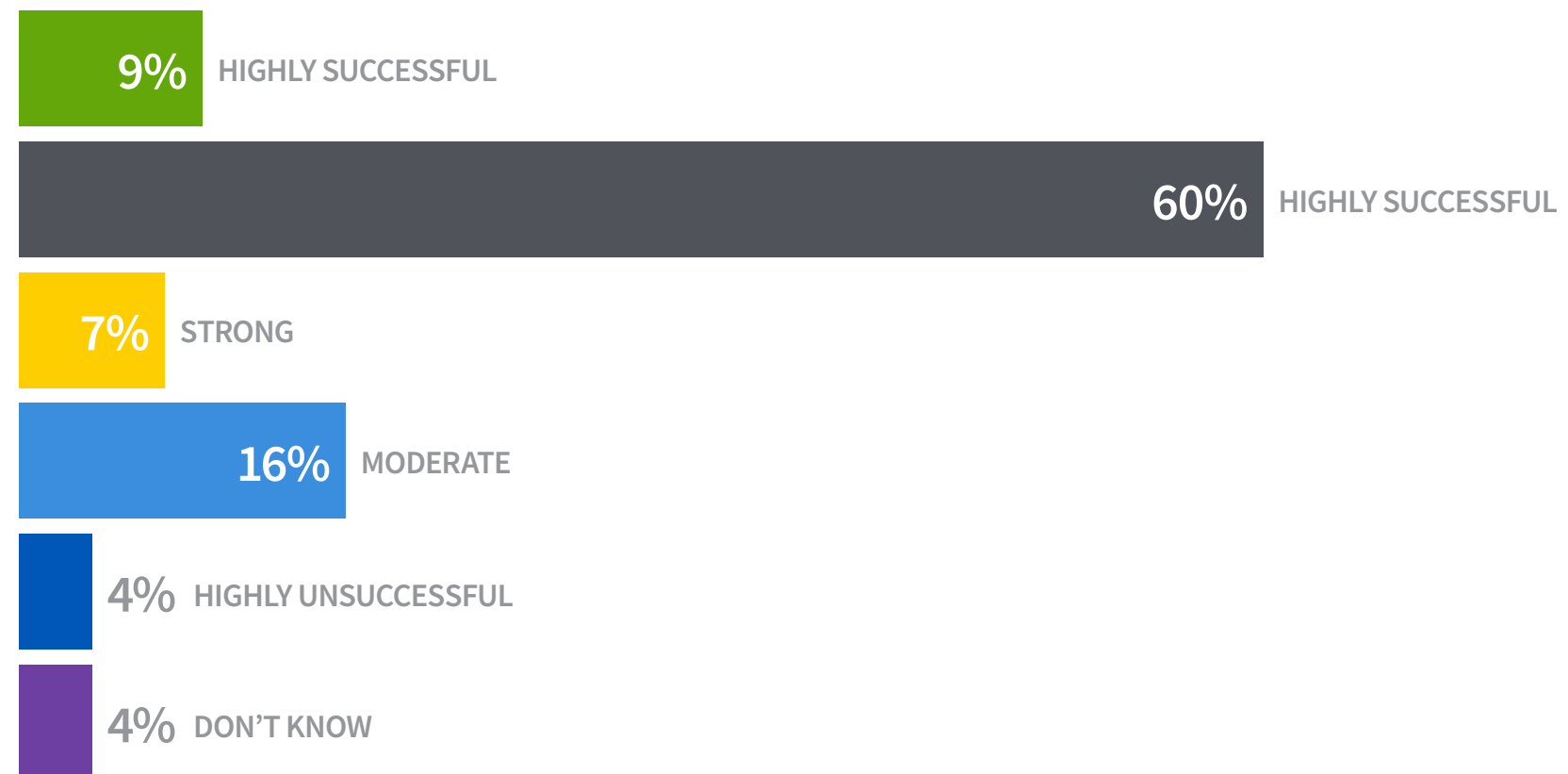
Q11 Key finding

Over
60%
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Q11 To what extent do you agree or disagree that renewable energy sources have reached cost parity with fossil fuels across the industry?

Extent of agreement





Q12 What are the biggest barriers your business faces in bringing new technology or innovation to market?

Q12 Key finding

Just under

59%

felt uncertainty over
returns was the biggest
barrier to bringing
innovation to market





Q12 Key finding

Just under

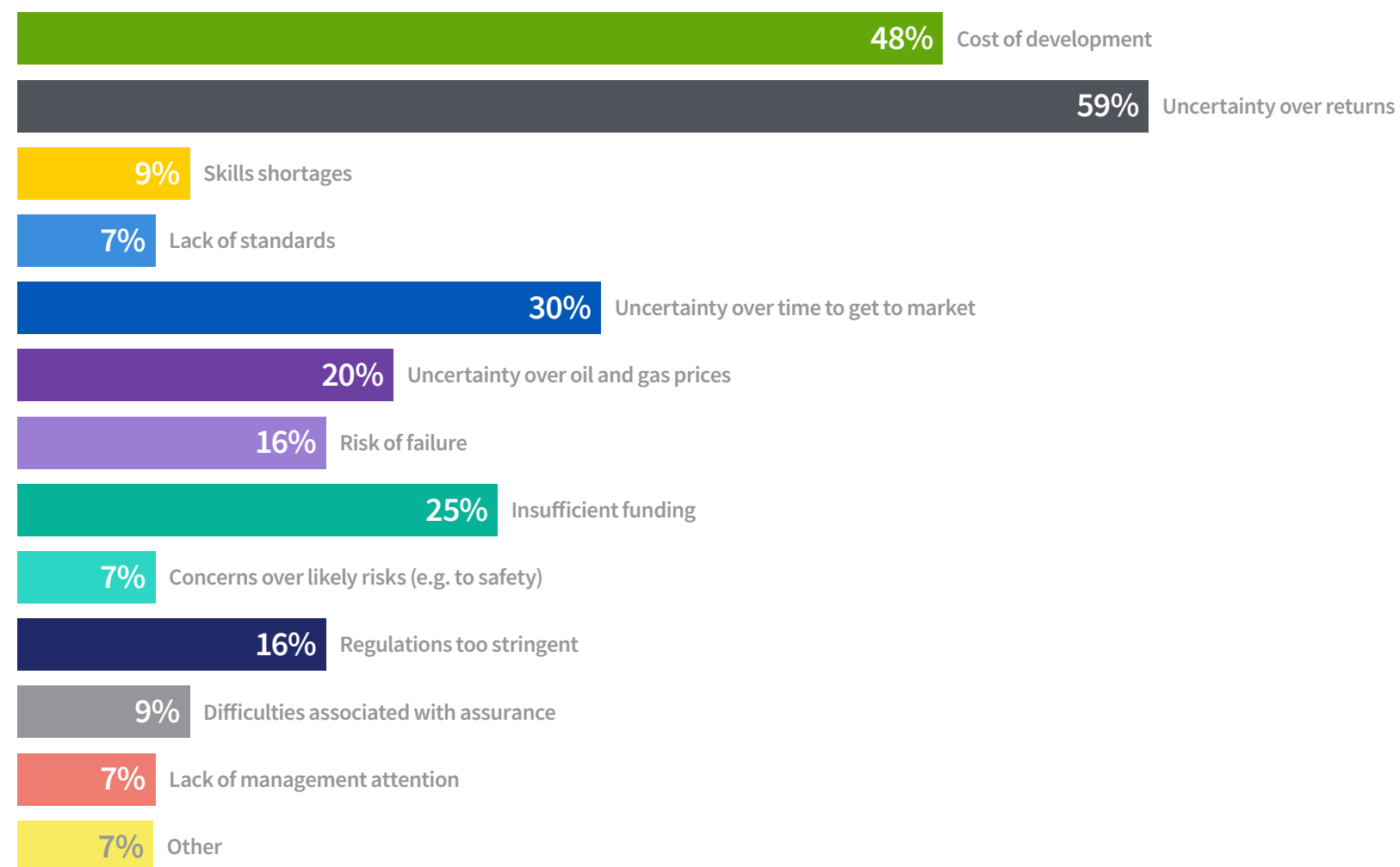
59%

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Q12 What are the biggest barriers your business faces in bringing new technology or innovation to market?

Technology barriers to business





Q13 At which stages of the innovation lifecycle do you see most potential for the industry as a whole to collaborate more effectively to speed up new technology and breakthroughs?

Q13 Key finding

48%

saw technology development key to speeding up the rate of innovation and breakthrough





Q13 Key finding

48%

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Q13 At which stages of the innovation lifecycle do you see most potential for the industry as a whole to collaborate more effectively to speed up new technology and breakthroughs?

Effective collaboration

