



# DIGITAL RE-DEFINERY - DIGITAL REFINING SURVEY 2019

## VIDEO TRANSCRIPT

### **Tracey Countryman** **April 2020**

Hello. I am Tracey Countryman. I'm a Managing Director at Accenture and the Global Refining and Industry X.0 Lead.

This is the third annual Digital Refining Survey.

This survey is intended to help us understand how organizations are using digital in the refining area of their business.

We were excited to see how this year's survey results compared to the outcomes from the past two years.

Working with PennWell Publications, we reached out to refiners operating around the world — and had 145 responding individuals.

The roles of the survey respondents varied widely, from the C-Suite to Engineers and Project Managers to IT, and nearly every role in between.

The type of companies represented was just as important. We heard from IOCs, NOCs, Independents, consultants and contractors.

So, what were the major findings?

There were five main trends identified and these reflect a change from past surveys.

First, most refiners now confirm that they are investing more or significantly more in digital than in the previous years.

Some refiners are seeing basic margin improvements from data analytics, platforms and Internet of Things. (IoT)

Second, digital benefits will be enabled by future investments.

Nearly 60% of refiners see the highest benefits today from digital investment in production planning and execution, then maintenance and reliability.

Future investments will target greater process optimization, predictive asset management and further automation in the facilities.

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The third key trend identified was that resistance to digital adoption is rising forcing a greater focus on people priorities.

Cost for the first time in the three years is no longer the highest barrier to digital adoption.

Refiners are now more aware that the final mile of digital transformation around organization and people change, the new ways of working, is very difficult to achieve.

Fourth trend revealed an acknowledgement that digital is hard to scale. Fewer refineries this year classified themselves as “digitally mature” as compared to last year.

The final key trend identified was around digital journey partnerships. Less than 25% of refiners will look to drive digital capability in-house. To scale digital and realize value, a majority of the respondents will look to the wider ecosystem for support.

These key trends show that refiners are well on their way into their digital journeys, however their recent experiences are re-defining what they see as the critical next step required.

Refiners accept that they must focus on the last mile of their digital transformation, being organizational and people acceptance, new ways of working, to attain the results they seek.

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