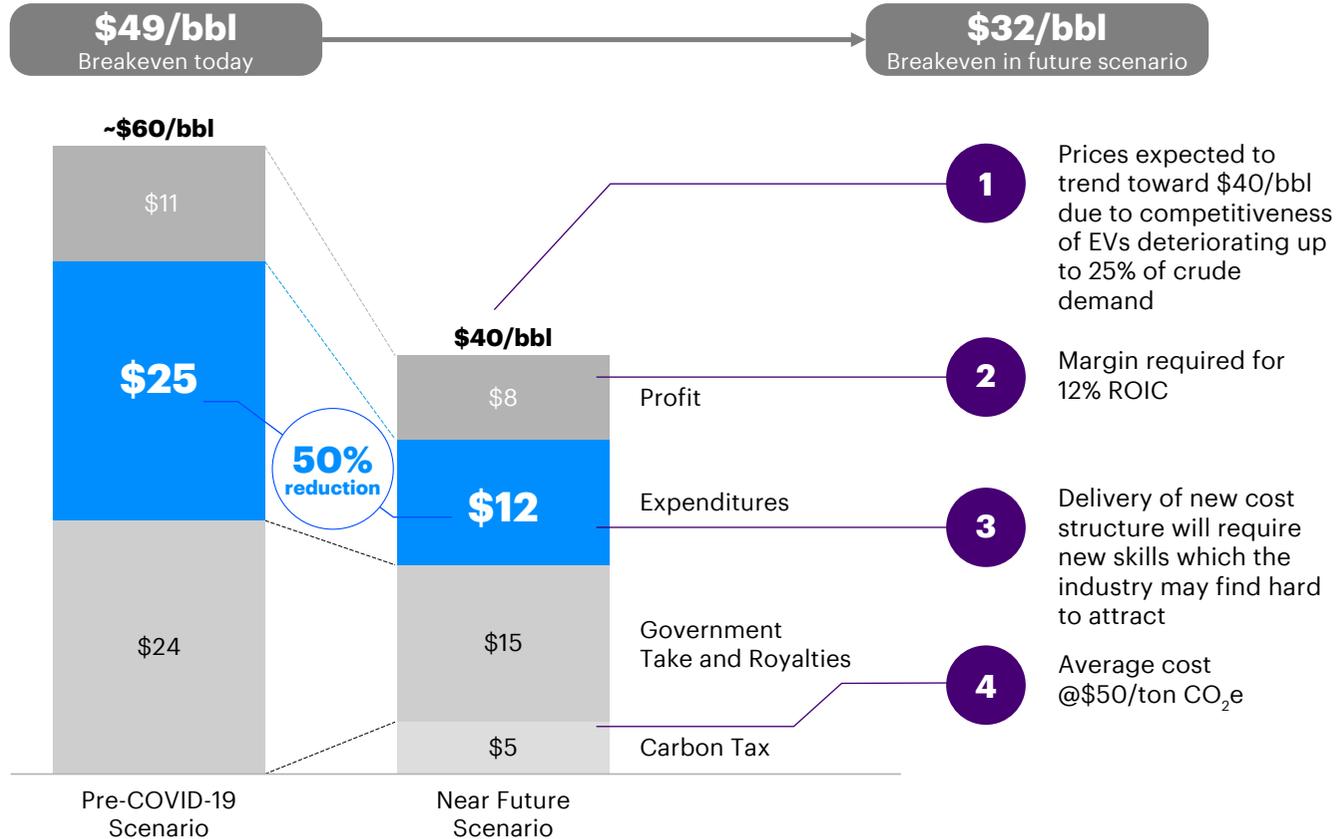


FIGURE 1: A NEW NORMAL FOR EXPEDITURES UNDER COMPRESSED BREAK-EVENS

Implications of pressures on oil and gas industry to 2030



Source: Accenture Analysis