



Aberdeen & Grampian
Chamber of Commerce
The Ultimate Business Network

Aberdeen & Grampian Chamber of Commerce **Oil and Gas Survey** Spring 2012

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1 BUSINESS OPTIMISM

Are you more/less confident about the business situation in the oil & gas sector compared to a year ago?

Looking ahead a year

How have the tax changes last year affected:

The level of operational activity

Investment plans

THE OIL & GAS SECTOR IN THE UKCS			THE OIL & GAS SECTOR ELSEWHERE			
MORE	SAME	LESS	MORE	SAME	LESS	N/A
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased			No change		Reduced	
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

2 BUSINESS TRENDS

Excluding seasonal factors, what are the trends in:

The total value of your organisation's contract work in the UKCS
of which:

The value of production related work

The value of decommissioning related work

Total contract work elsewhere (if appropriate)
of which:

The value of production related work

The value of decommissioning related work

ACTUAL TREND IN PAST YEAR 2011				PLANNED/SCHEDULED OR EXPECTED TREND IN 2012 AND 2013			
UP	LEVEL	DOWN	N/A	UP	LEVEL	DOWN	N/A
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 ACTIVITY LEVELS AND BUSINESS TRENDS

Is the level of UKCS based work leading to you working above or below optimum levels in the UKCS?

Is the level of overseas based work leading to you working above or below optimum levels?

Looking to the medium term (three to five years) do you think your organisation will be more involved in:

The Renewables sector

Decommissioning activity

ABOVE OPTIMUM LEVELS	AT OPTIMUM LEVELS		BELOW OPTIMUM LEVELS	
Yes, definitely	Yes, possibly	Unlikely	No	Not relevant
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 EMPLOYMENT

What have been the trends in UK based employment in your company?

	ACTUAL TREND IN 2011			EXPECTED TREND IN 2012		
	UP	LEVEL	DOWN	UP	LEVEL	DOWN
Permanent employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract and temporary staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	ABOVE	AT PLANNED LEVELS	UNDER	ABOVE	AT PLANNED LEVELS	UNDER
Total hours worked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What is the total number of people working for your company in the UK?	<input type="text"/>					
And employees outside the UK	<input type="text"/>					

5 INVESTMENT TRENDS

What are the trends in your company's investment spend for the UKCS area?
(Please tick NA if not appropriate)

	ACTUAL IN 2011				SCHEDULED TREND OVER NEXT TWO YEARS			
	UP	LEVEL	DOWN	NA	UP	LEVEL	DOWN	NA
Total trends in investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
of which:								
Research and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developing new markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment replacement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost reduction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decommissioning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developing a renewables capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Which would be the main reasons for investment?

What would be the main reasons for the change in investment levels?



6 RESEARCH AND DEVELOPMENT

Is your company's R & D activity mainly concerned with?
(Please tick all that apply)

- | | | | |
|---|--------------------------|----------------------------------|--------------------------|
| Developing new equipment/products | <input type="checkbox"/> | Developing new software | <input type="checkbox"/> |
| Developing new processes | <input type="checkbox"/> | Developing new services | <input type="checkbox"/> |
| Improving extraction processes | <input type="checkbox"/> | Improving extraction yields | <input type="checkbox"/> |
| Developing decommissioning processes | <input type="checkbox"/> | Developing renewables activities | <input type="checkbox"/> |
| No R & D activity
(Please go to Q 7) | <input type="checkbox"/> | | |

Is your company's R & D activity mainly located in?

- | | | | |
|-----------|--------------------------|----------------------|--------------------------|
| The UKCS | <input type="checkbox"/> | In the United States | <input type="checkbox"/> |
| In Europe | <input type="checkbox"/> | Elsewhere | <input type="checkbox"/> |

7 TRENDS IN RESEARCH & DEVELOPMENT IN CLIENTS AND SUPPLIERS

In terms of the companies you mainly deal with what is your impression of the likely trends in their spend on R & D over the next two years?

	UP	LEVEL	DOWN	N/A
In the UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elsewhere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8 UKCS COMPETITIVENESS

Which have been the main areas in which the UKCS has remained competitive?

In which areas has the UKCS become less competitive?

What have been the main reasons for the changes?

9 BUSINESS CONSTRAINTS

How important are the following factors in limiting activity over the next year?
(Please tick all that apply)

	UK CONTINENTAL SHELF ACTIVITIES			ACTIVITY ELSEWHERE (if applicable)		
	VERY IMPORTANT	IMPORTANT	NOT IMPORTANT	VERY IMPORTANT	IMPORTANT	NOT IMPORTANT
Commodity price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economic climate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax relief/capital allowances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rising and lift costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Costs of capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to capital and loans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skills shortages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of staff to other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local facilities and resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overly restrictive and complex regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decommissioning issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify:						

10 INDEPENDENCE REFERENDUM

Is the planned referendum in Scotland in 2014 and its possible consequences a factor in future plans and investment proposals?

Yes No

THANK YOU

Please turn to the next page for details on how to return your questionnaire

You can return the completed questionnaire by post (using the enclosed FREEPOST envelope) or by fax (0141 548 5776)

If you have received this questionnaire electronically then please return the questionnaire to surveymanager@agcc.co.uk

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