GDA
DIGITAL REFINERY SURVEY

Refiners in the Gulf Cooperation Council (GCC) believe in digital, but not all of them have unlocked the full potential. Many GCC refiners have piloted digital applications, but only a few have industrialized them. What holds them back?

GCC Refiners Value Digital

GCC refiners have high expectations for digital

Challenges to be solved

04% Safety

10% Cyber security

19% Knowledge retention

24% Production optimization

43% Reliability

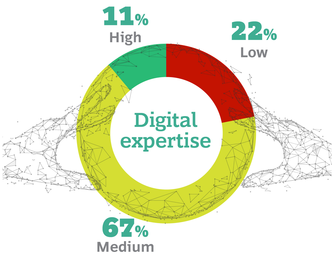
#1 risk of not investing

12% Increase in plant reliability issues

38% Loss of competitive advantage

50% Lack of ability to continue to reduce costs/increase margins

GCC refiners investment in digital is only moderate



Investment per refinery

12% Less than **USD1M**

44% Over **USD20M**

44% Between **USD1M** and **USD10M**

Two reasons stand out for GCC refiners' conservative approach

Limited integration of digitalization strategy.
Fewer than half of GCC refiners said they have an integrated strategy for adopting digital across their operations.

A fear of the unknown that holds refineries back.
50% of the respondents in the GCC said that a lack of proven technology is the biggest challenge to investment

International Oil Companies are Pursuing Digital in Six Areas

Digital areas in refining

- Advanced market driven operations
- Next-gen planning and scheduling
- Asset management 4.0
- Safety and field productivity
- Trading/Commercial plant interface
- Support functions excellence

Collaboration Can Take GCC Refiners Forward

While the survey shows that there is a clear trend to digitalization among GCC refiners, it also suggests that there is still significant value to be unlocked. The early successes with digital, and its obvious potential, point to a need for a way to overcome challenges GCC refiners face that are associated with investment in digital technology not necessarily fully proven.

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