CERAGON

Coleman Parkes

Oil and Gas Survey

CP4233

March 2025

ABOUT COLEMAN PARKES

Coleman Parkes is a global market research agency that enables industry-leading businesses to stay ahead with survey data.

For over 20 years Coleman Parkes have developed quantitative and qualitative market research programs that deliver award winning thought leadership reports, press releases and standout headlines that identify new and emerging trends and instill their clients with confidence and credibility.

CLIENT ROSTER INCLUDES:

accenture, aws, amdocs, BlackBerry, LIFE, NTT, cognizant, KPMG, SAP, grist, wipro, TEAM LEWIS

SURVEY DETAIL

METHODOLOGY

Online survey

400 total respondents

AUDIENCE PROFILE

Those who are Involved in oil and gas operations or contribute to decision-making on oil and gas connectivity and infrastructure

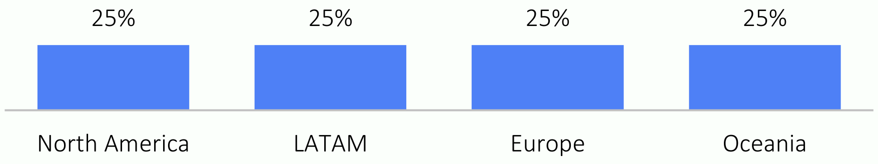
FIELDWORK DATES

March 2025

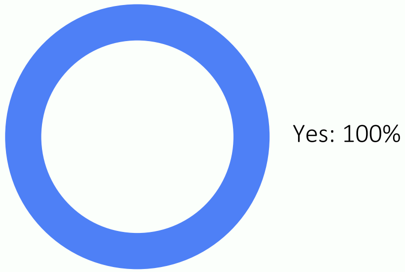
Europe	100	UK, Spain, etc.
North America	100	USA, Canada
Oceania	100	Australia, New Zealand
LATAM	100	Brazil, Mexico, etc.

BUSINESS PROFILE

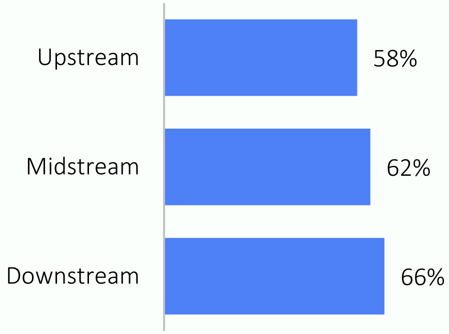
REGION



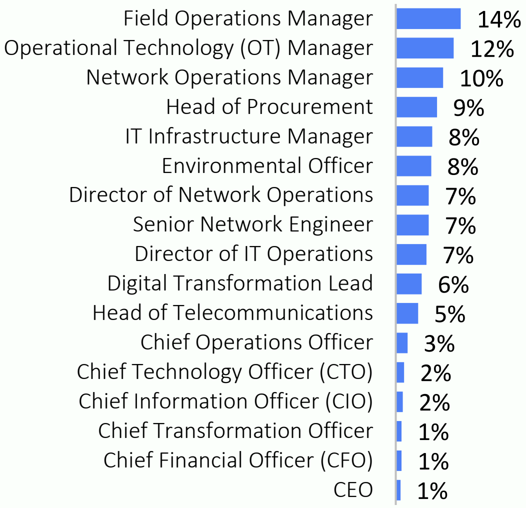
TELECOMS NETWORK USAGE



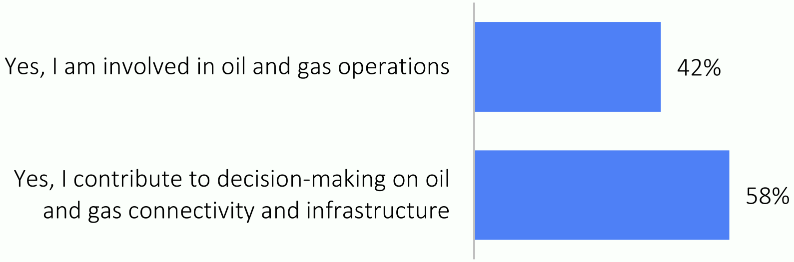
OIL & GAS INDUSTRY SEGMENT



JOB TITLE



INVOLVEMENT IN OIL AND GAS OPERATIONS OR DECISION-MAKING



KEY INSIGHTS

Globally, organisations within the oil and gas industry heavily rely on mission-critical communications, with approximately seven in ten of personnel depending on robust connectivity. Satellite communications (60%) remain the predominant solution, especially in LATAM (74%), while Wi-Fi and local networks are also widely utilised (54%), notably in Europe (62%).

Key challenges identified by the industry include offshore connectivity issues affecting over half of organisations and significant coverage gaps in remote locations (38%), particularly pronounced in Europe and Oceania. Security and data protection (63%), reliability in challenging environments (57%), and high upfront costs (52%) are leading concerns when adopting new connectivity technologies.

Network disruptions remain prevalent, affecting almost all companies, with frequent interruptions experienced by around a third of organisations globally. Connectivity management typically involves third-party providers, though a third utilise internal resources. Decision-making is primarily driven by IT and technology departments (61%), with strong involvement from engineering teams (49%).

KEY INSIGHTS

Interest in private wireless networks is growing, with around a third actively using or exploring these solutions and an additional 59% showing high interest. However, cost and budget constraints (49%) and compatibility with existing systems (39%) present considerable barriers. Regulatory compliance, especially industry-specific safety standards and cybersecurity guidelines like IEC 62443 and NIST, notably impact connectivity strategies.

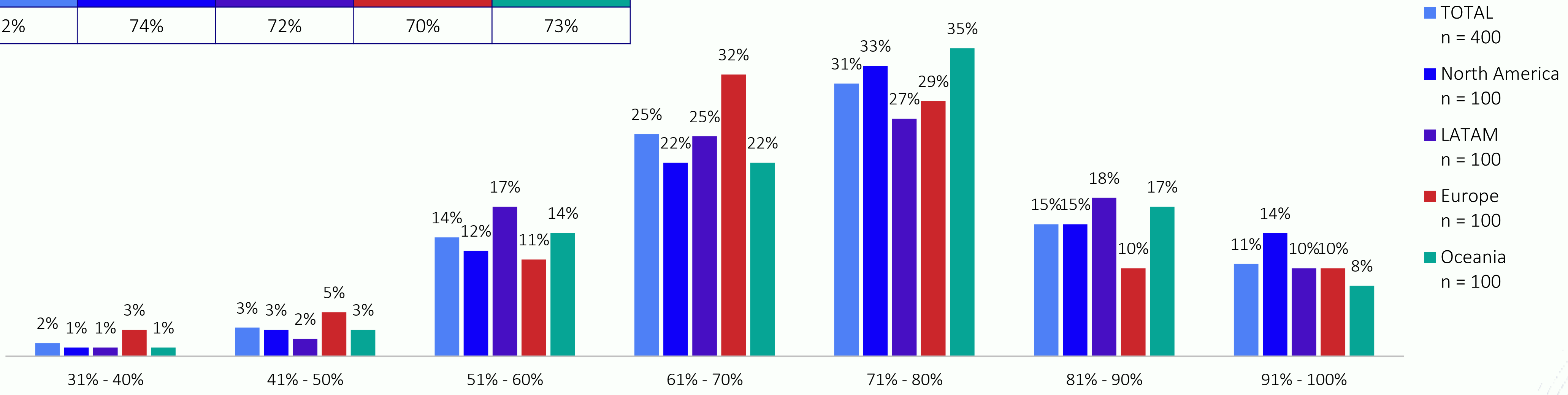
Sustainability and ESG factors are increasingly crucial in vendor selection, with 85% acknowledging their importance and 47% explicitly prioritising them, albeit with regional variations, such as a slightly lower emphasis in Europe (41%).

SURVEY FINDINGS

PERSONNEL RELYING ON MISSION-CRITICAL COMMUNICATIONS

On average, nearly three-quarters (72%) of companies' personnel depend on mission-critical communications across organisations globally emphasising the importance of their role.

	TOTAL n = 400	North America n = 100	LATAM n = 100	Europe n = 100	Oceania n = 100
Mean	72%	74%	72%	70%	73%

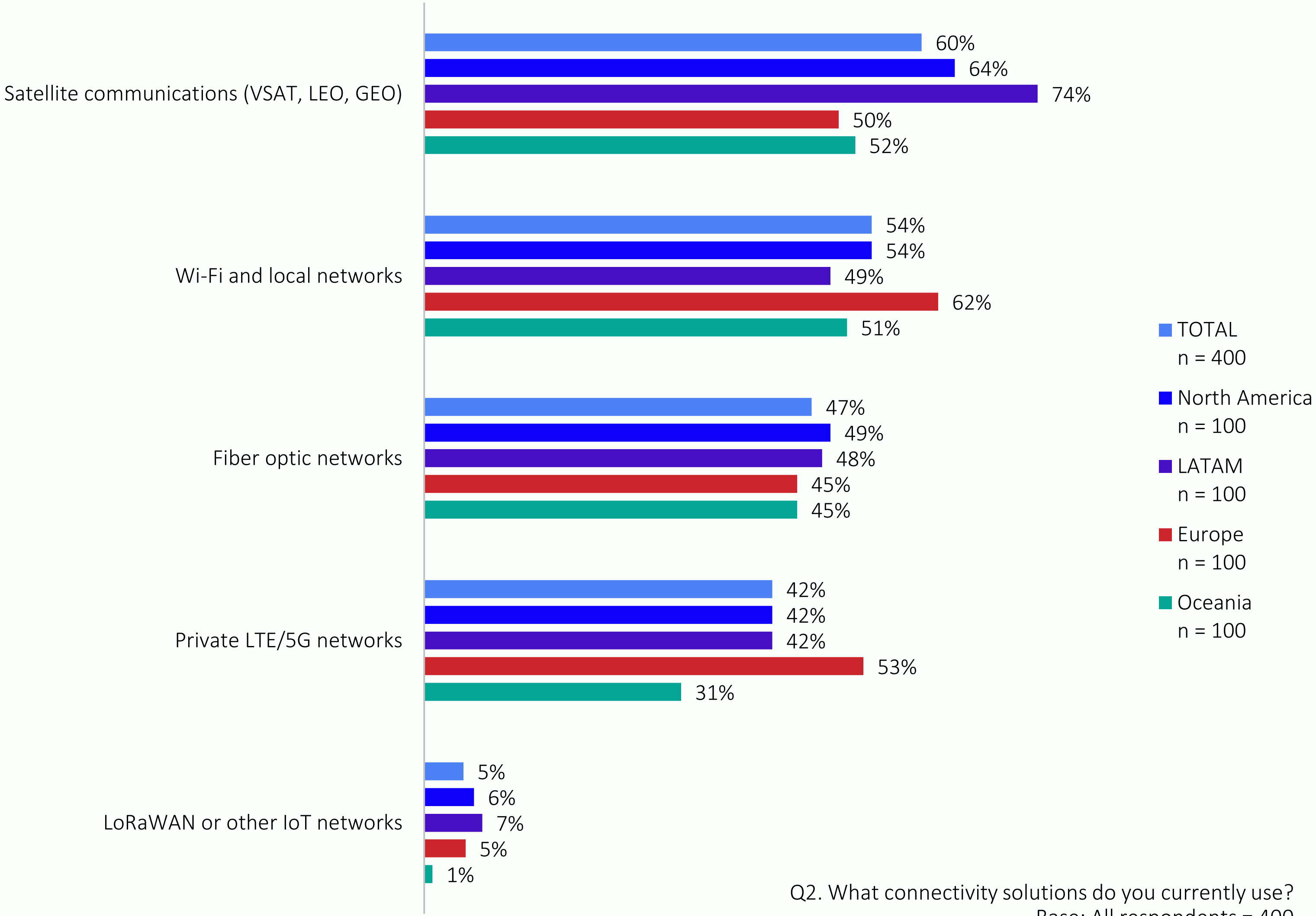


Q1. What percentage % of your organization's personnel rely on mission-critical communications?
Base: All respondents = 400

Single Code question

CURRENT CONNECTIVITY SOLUTIONS USED

Satellite communications are the most commonly adopted connectivity solution, used by 60% of organisations globally, notably higher in LATAM (74%). Wi-Fi and local networks are also widespread, used by (54%) overall, particularly strong in Europe (62%). IoT networks remain niche, utilised by less than 5% of organisations.

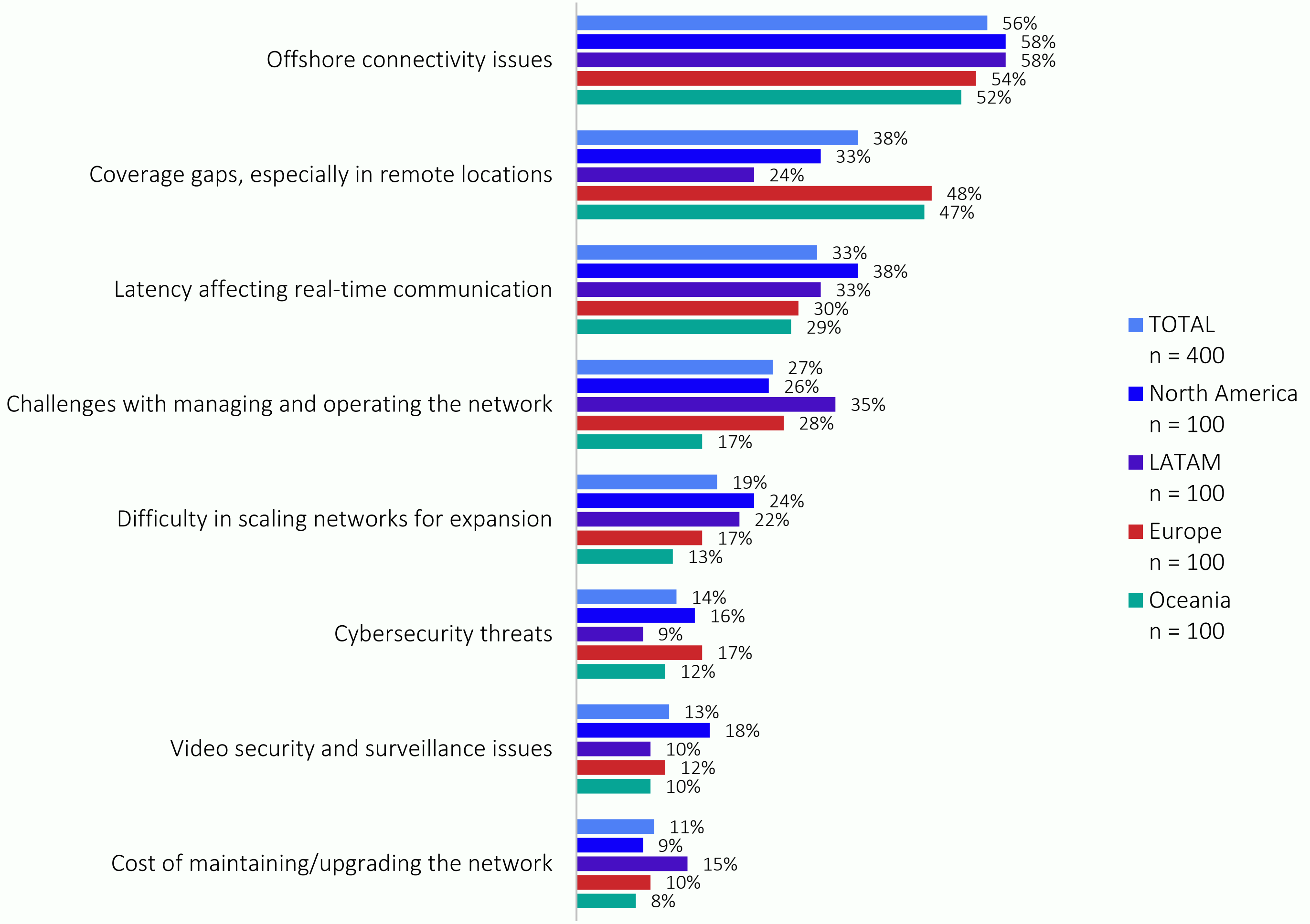


Q2. What connectivity solutions do you currently use?
Base: All respondents = 400

Multicode question

BIGGEST CHALLENGES WITH CURRENT NETWORK

Offshore connectivity issues present the largest challenge for over half (56%) of organisations. Coverage gaps, particularly in remote locations, significantly affect two-fifths (38%) of organisations, especially impacting Europe (48%) and Oceania (47%). Challenges managing networks affect around a quarter globally (27%), but this is more critical in LATAM (35%).

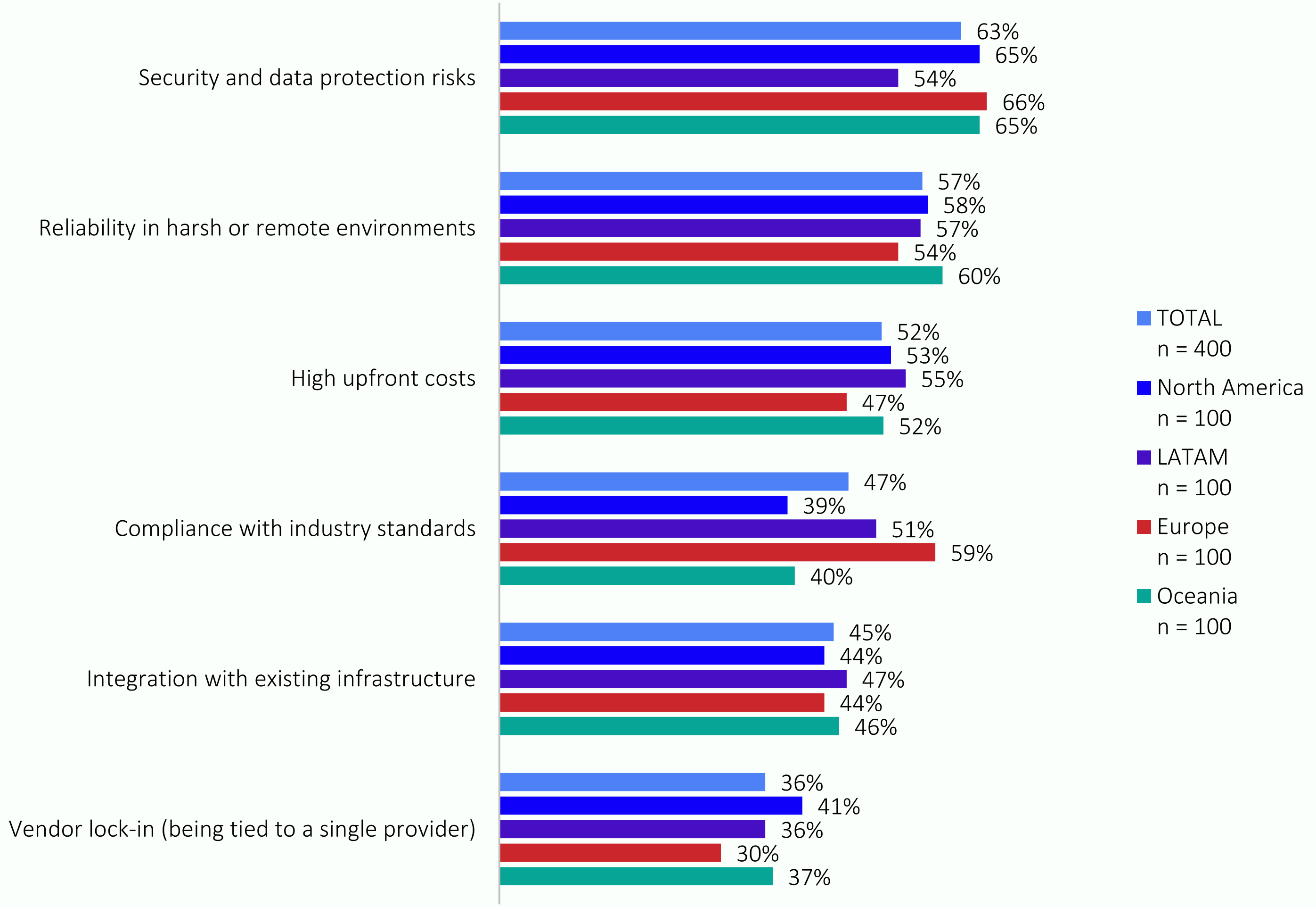


Q3. What are your biggest challenges with your current communication network?
Base: All respondents = 400

Multicode question

BIGGEST CONCERNS IN ADOPTING NEW CONNECTIVITY SOLUTIONS

63% of companies are primarily concerned with security and data protection when adopting new solutions, less so in LATAM (54%). Reliability in harsh or remote environments is a key worry for more than half of companies (57%). High upfront costs concern over half (52%) of companies. Integration challenges with existing infrastructure are a concern for around 45% of companies across all regions.

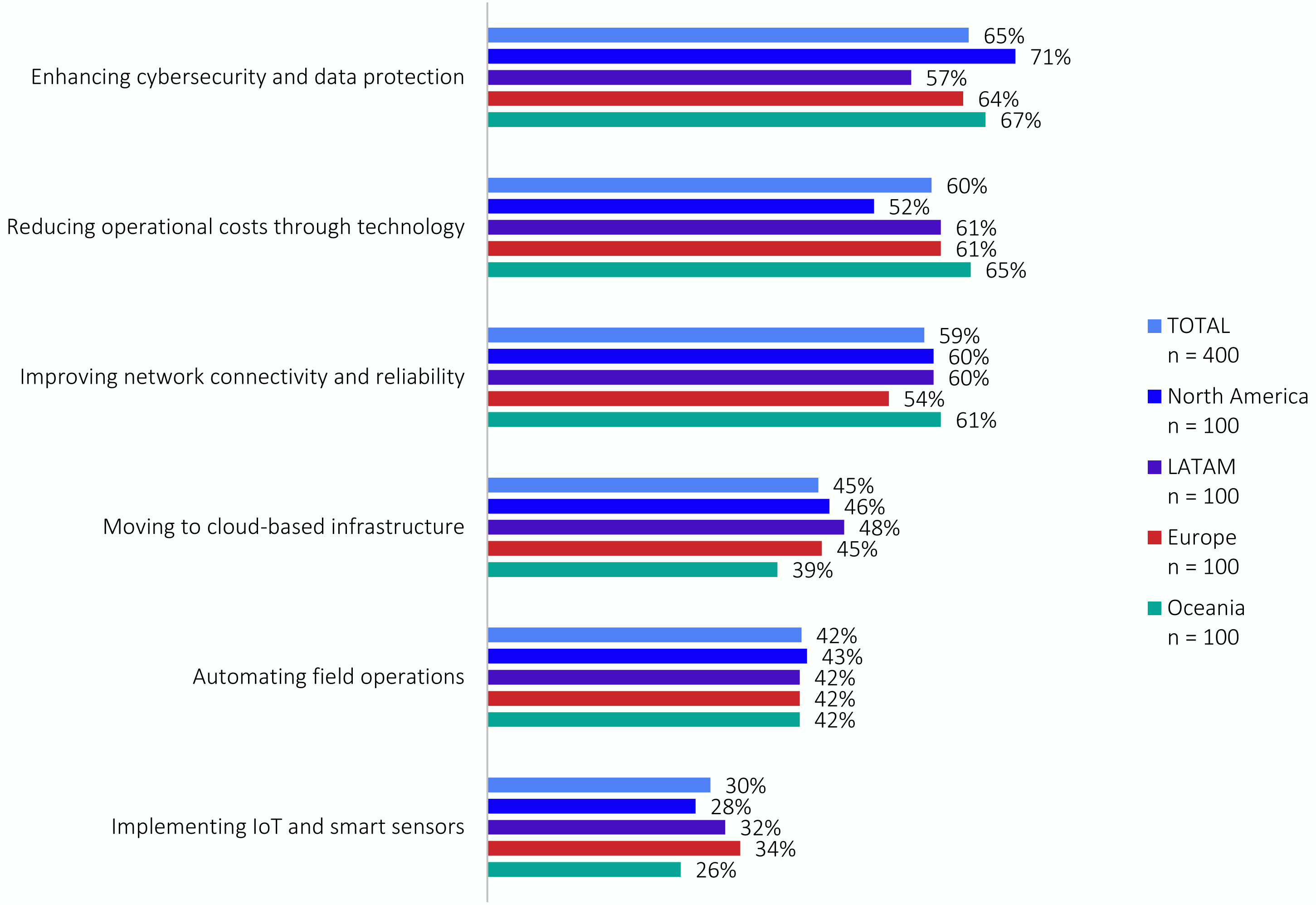


Q4. What are your biggest concerns when adopting new connectivity solutions? Rank 1/2/3
Base: All respondents = 400

Ranking question

DIGITAL TRANSFORMATION PRIORITIES IN THE NEXT 12-24 MONTHS

Organisations identify with enhancing cybersecurity and protecting data as their leading digital transformation objective (65%), especially in North America (71%). Around three-fifths (60%) also target cost reduction via technological advancements. Improving overall network reliability and connectivity remains crucial for 59% globally.



Ranking question

Q5. What are your organization's top priorities for digital transformation in the next 12-24 months? Rank 1/2/3
Base: All respondents = 400

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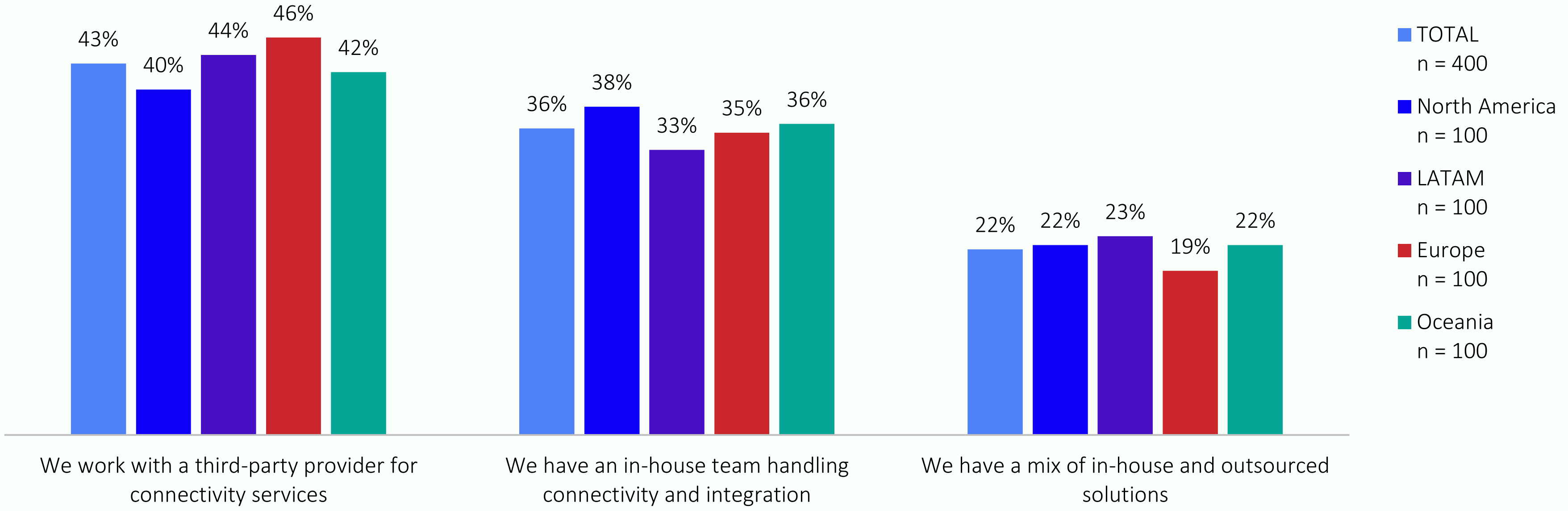
CONNECTIVITY MANAGEMENT ACROSS OPERATIONS

Connectivity management predominantly involves third-party providers for just over two-fifths of companies. Meanwhile, (36%) rely on internal expertise and dedicated in-house teams. 22% adopt hybrid connectivity management models, blending internal and external resources.



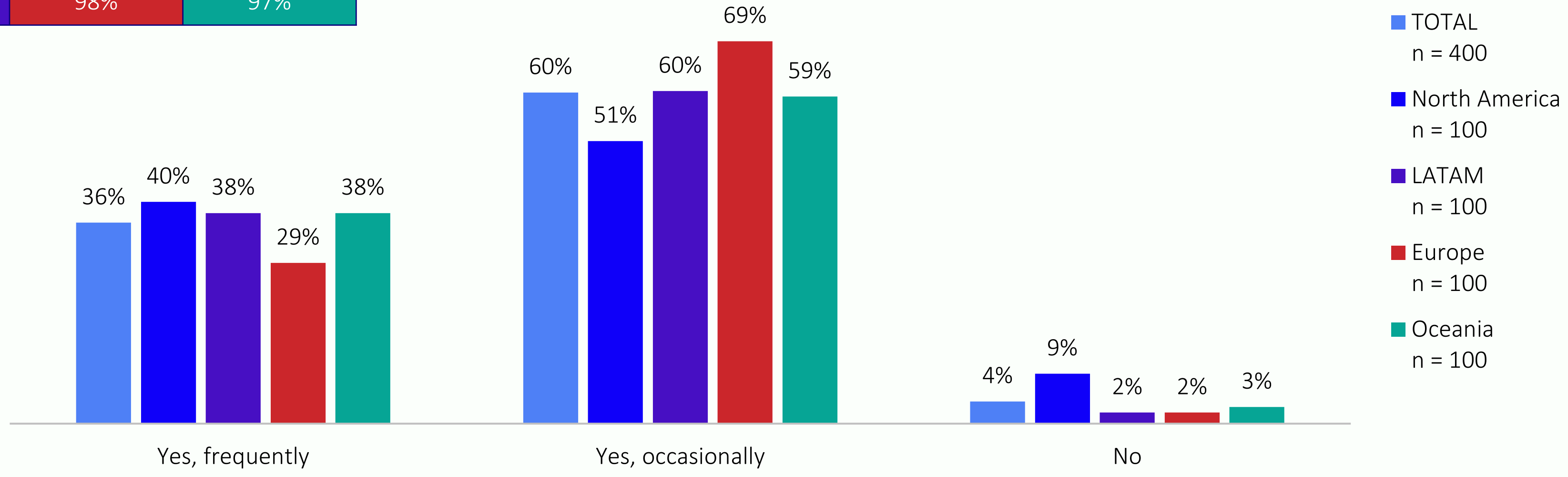
Single Code question

Q6. How do you currently manage connectivity across your operations?
Base: All respondents = 400

NETWORK DOWNTIME IN THE PAST YEAR

Nearly all companies (96%) encountered some degree of network disruptions in the previous year. Frequent disruptions impacted more than a third (36%) of companies globally, slightly less so for Europe at 29%. Occasional disruptions were more prevalent, affecting six in ten (60%). Only a small minority (4%) reported experiencing no network downtime.

Yes (net)				
96%	91%	98%	98%	97%



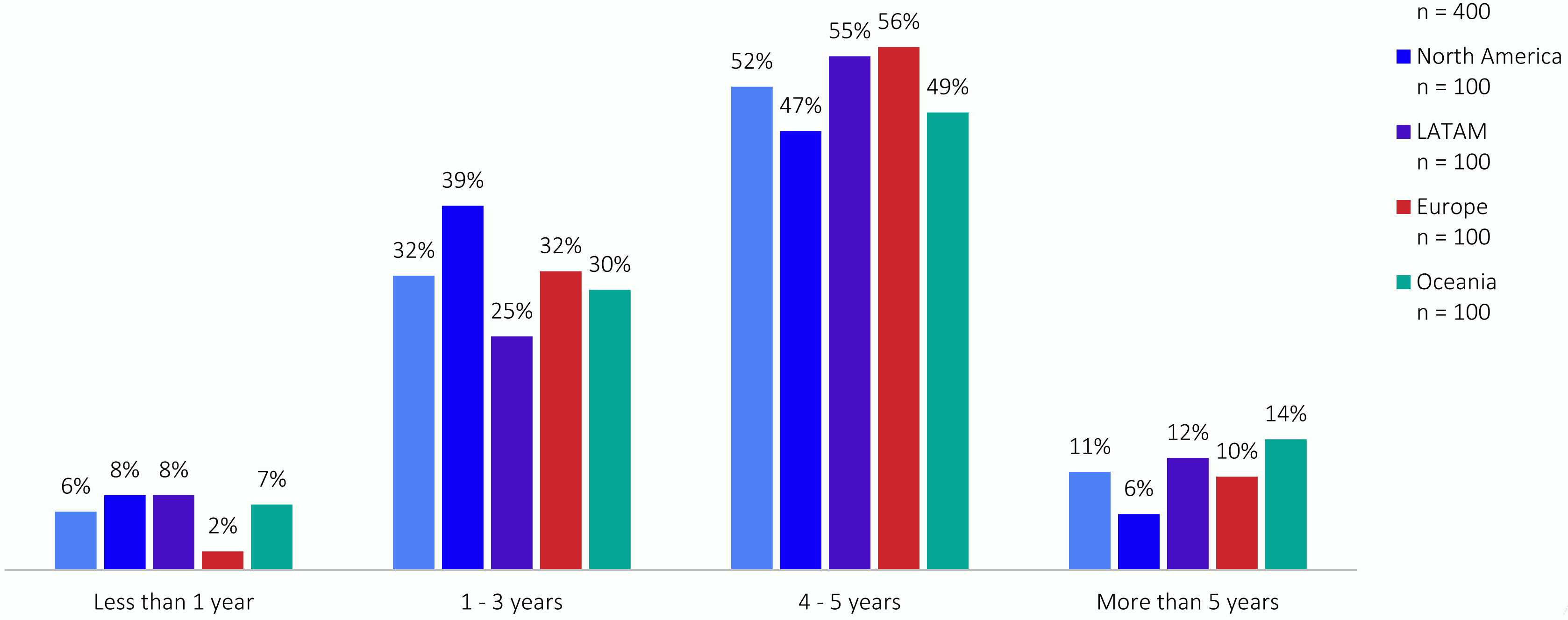
Q7. Have you experienced network downtime, failures or delays in the past year?
Base: All respondents = 400

Single Code question

TYPICAL PROCUREMENT CYCLE FOR NETWORK UPGRADES

Most agencies upgrade networks every 4 years in North America slightly more frequently – every 3 years.

	TOTAL n = 400	North America n = 100	LATAM n = 100	Europe n = 100	Oceania n = 100
Mean	4 years	3 years	4 years	4 years	4 years

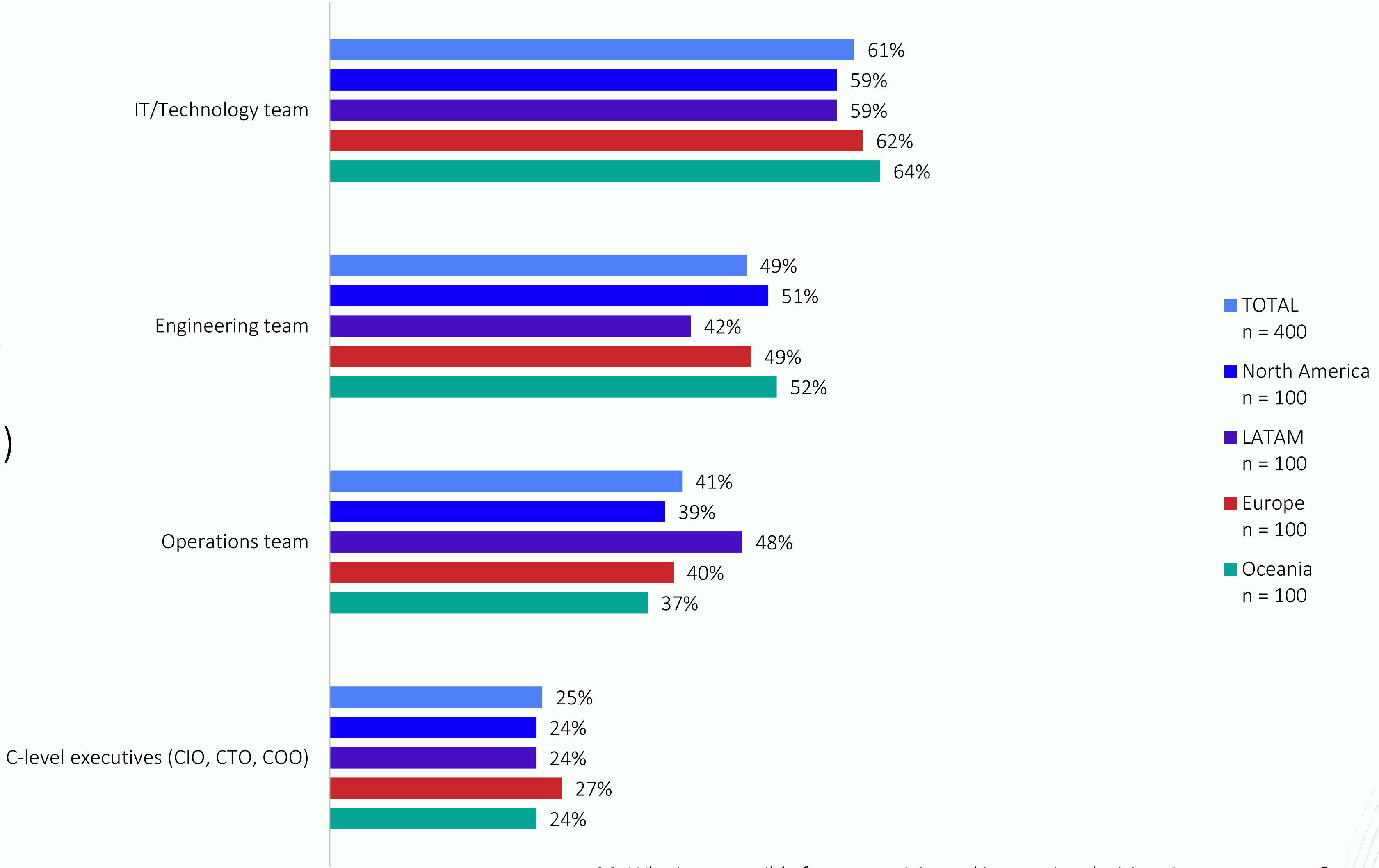


Q8. What is your organization's typical procurement cycle for upgrading communication networks?
Base: All respondents = 400

Single Code question

DECISION-MAKERS FOR CONNECTIVITY AND INTEGRATION

IT and Technology departments predominantly lead connectivity and integration decisions, influencing these choices in 61% of companies globally. Nearly half (49%) also involve Engineering teams, but less so in LATAM (42%).

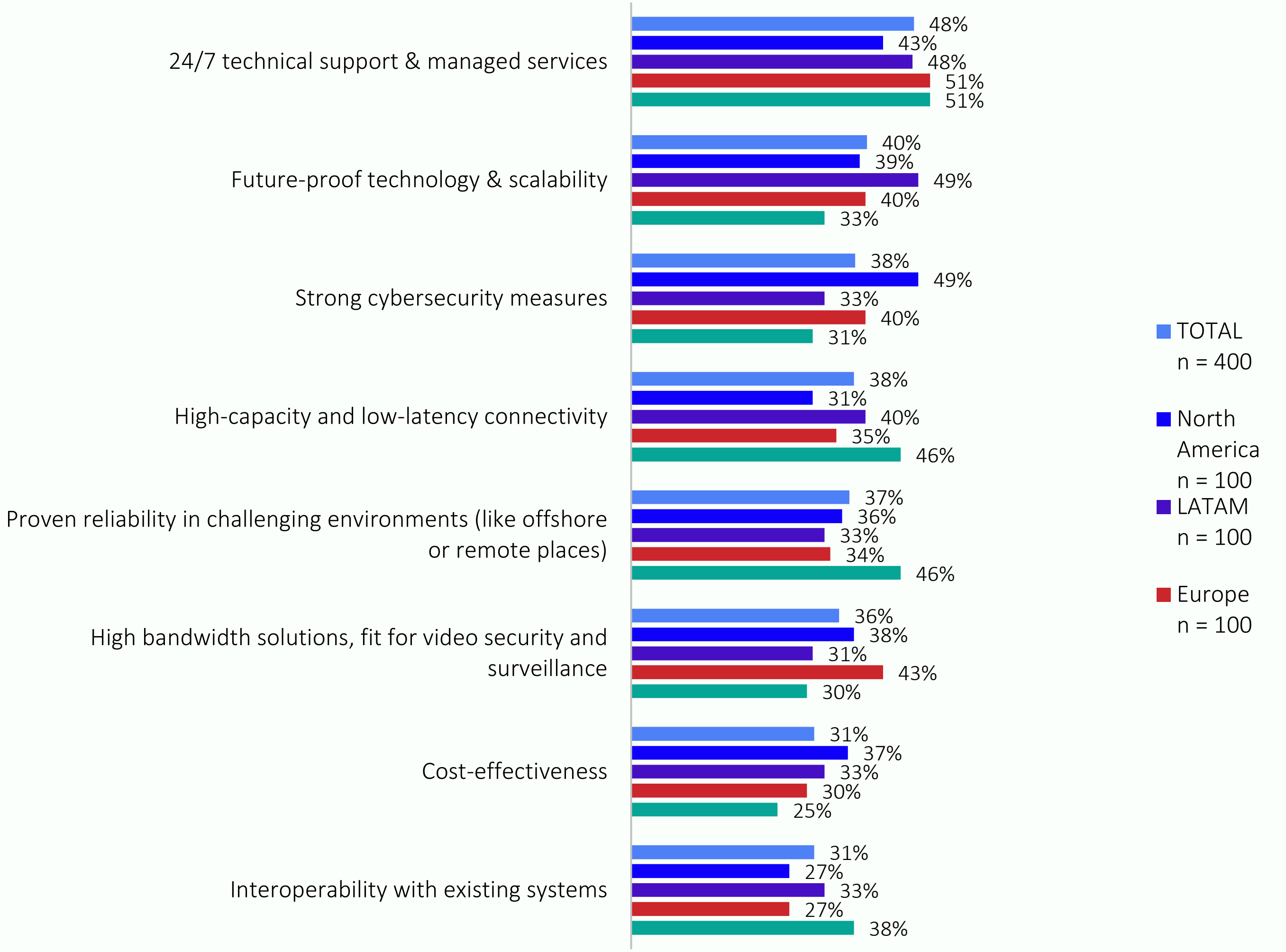


Q9. Who is responsible for connectivity and integration decisions in your company?
Base: All respondents = 400

Multicode question

KEY FACTORS IN CHOOSING A NETWORK PROVIDER

When selecting network service providers, almost half (48%) of companies' value comprehensive 24-hour technical support. Ensuring solutions are scalable and future-ready is crucial for 40% overall, slightly higher among LATAM companies (49%). Strong cybersecurity capabilities are critical for 38%, with North America prioritising this as important (49%).



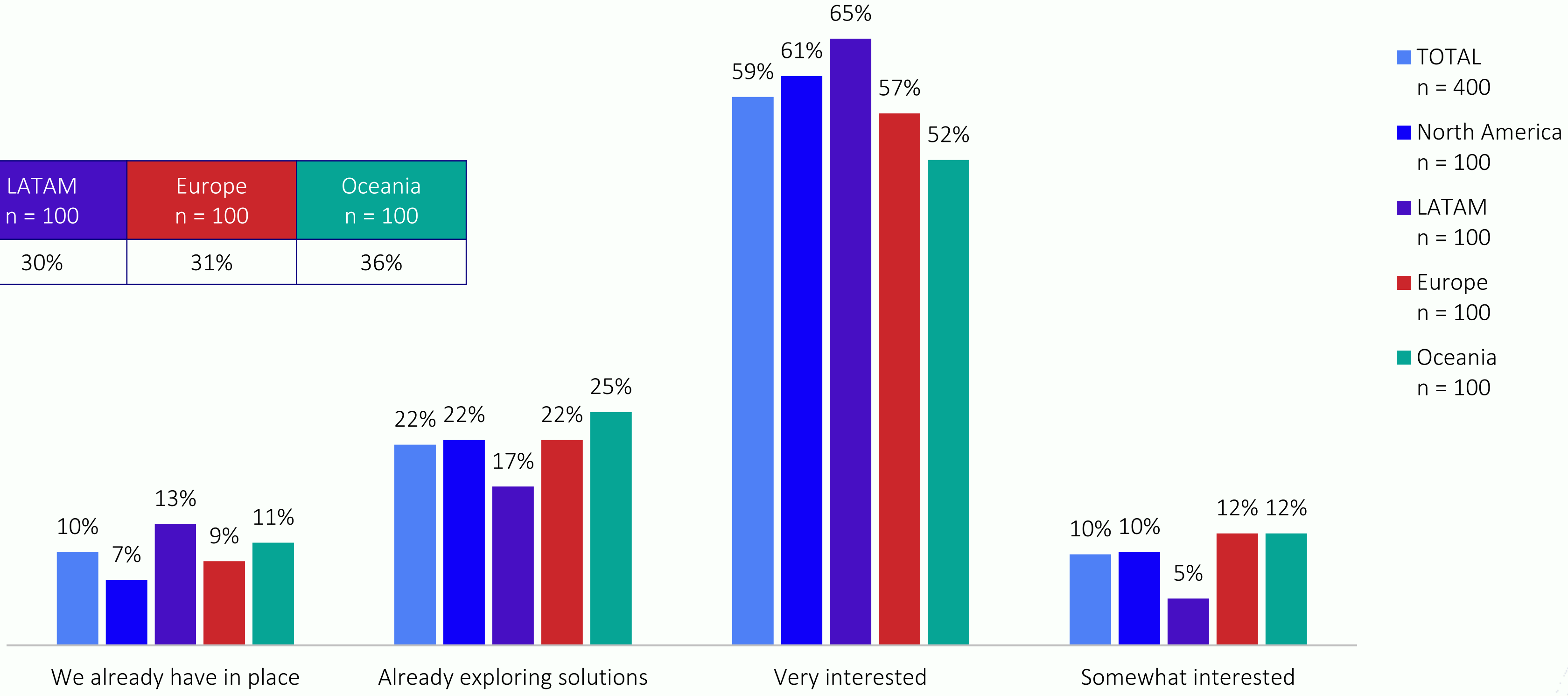
Ranking question

Q10. What factors are most important when selecting a network solution provider? Rank 1/2/3
Base: All respondents = 400

INTEREST IN PRIVATE WIRELESS NETWORKS

Around one-third (32%) of oil and gas companies either already use private wireless networks or are actively exploring them. A further 59% are showing high interest.

	TOTAL n = 400	North America n = 100	LATAM n = 100	Europe n = 100	Oceania n = 100
Top 2 box	32%	29%	30%	31%	36%

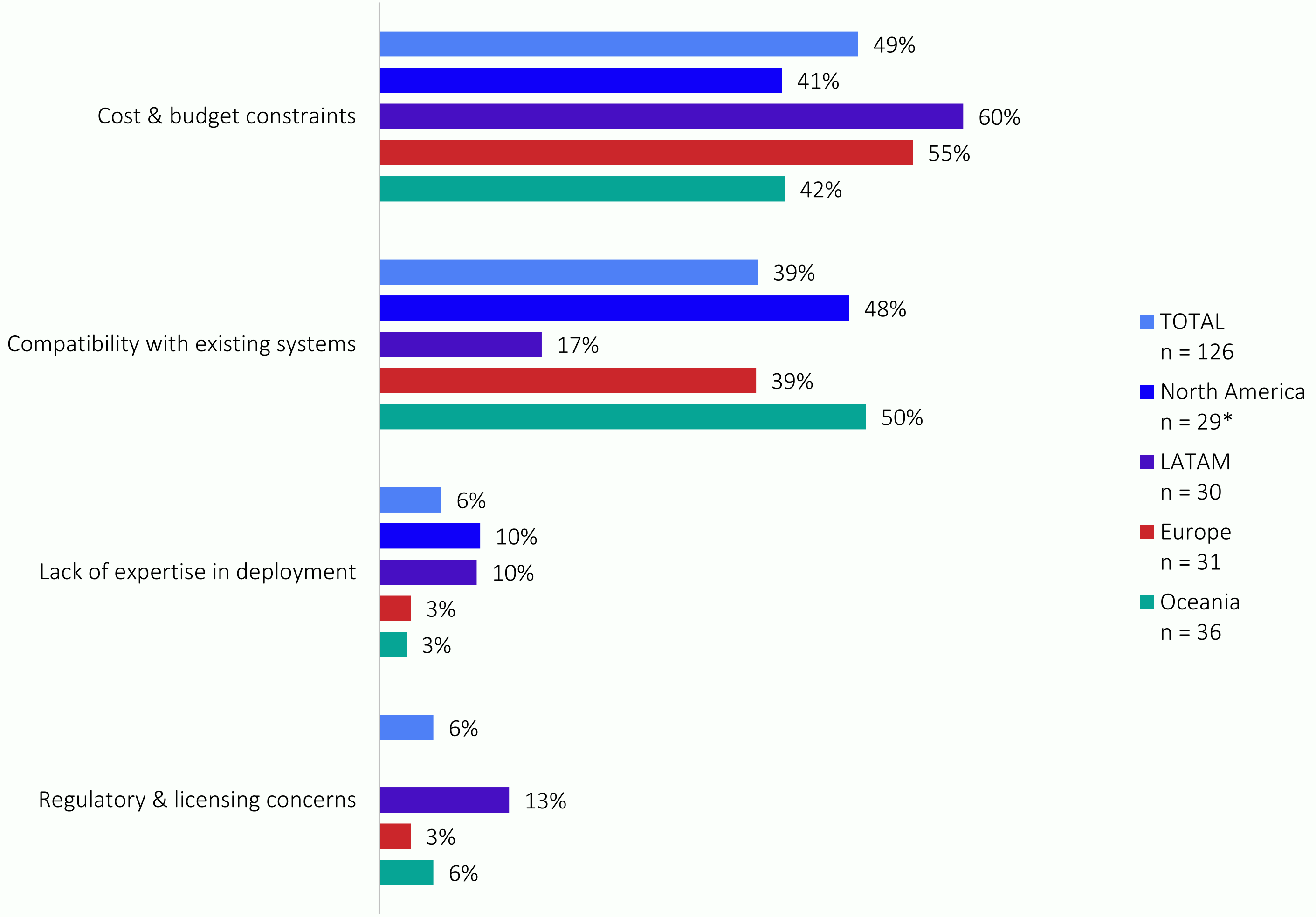


Q11. How interested are you in a private network wireless communication solution for your agency's communication needs?
Base: All respondents = 400

Single Code question

BIGGEST BARRIER TO PRIVATE NETWORK ADOPTION

Nearly half of the companies (49%) identify cost and budget constraints as their primary obstacle when adopting private wireless networks, particularly in LATAM (60%) and Europe (55%). Compatibility issues with existing systems are also significant (39%), highlighted especially in Oceania (50%) and North America (48%).

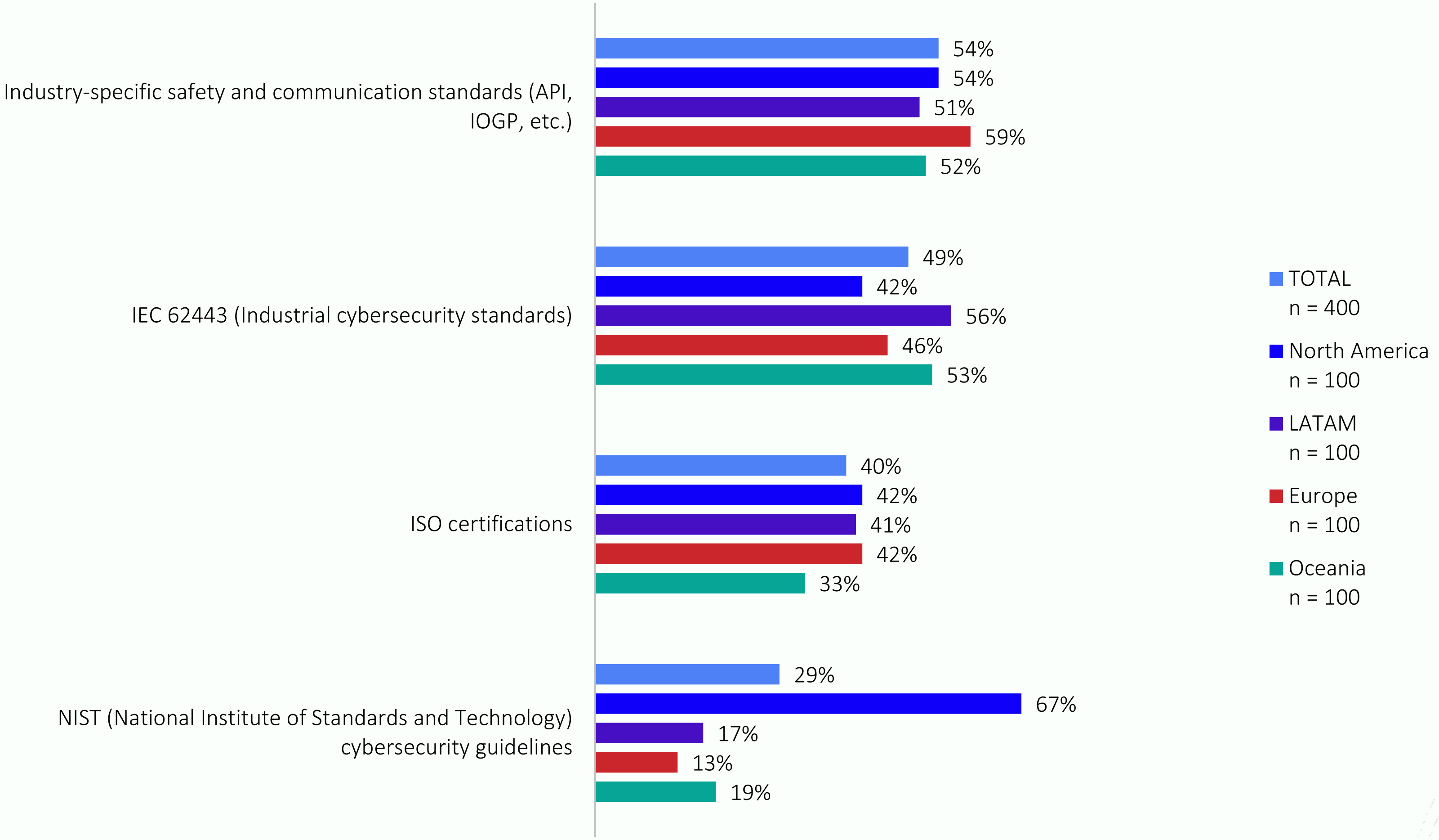


Single Code question

Q12. What has been/was the biggest barrier to adoption when you have been evaluating private wireless networks?
Base: Those who are already exploring solutions or already have them in place = 126; *column has less than 30 respondents.

REGULATORY AND COMPLIANCE REQUIREMENTS IMPACTING CONNECTIVITY

Industry-specific safety and communication standards (54%) are the most common regulatory factor influencing companies' connectivity decisions. IEC 62443 industrial cybersecurity standards closely follow at 49%, highest in LATAM (56%) . Impact of NIST cybersecurity guidelines (67%) is far higher for North America than for other regions.



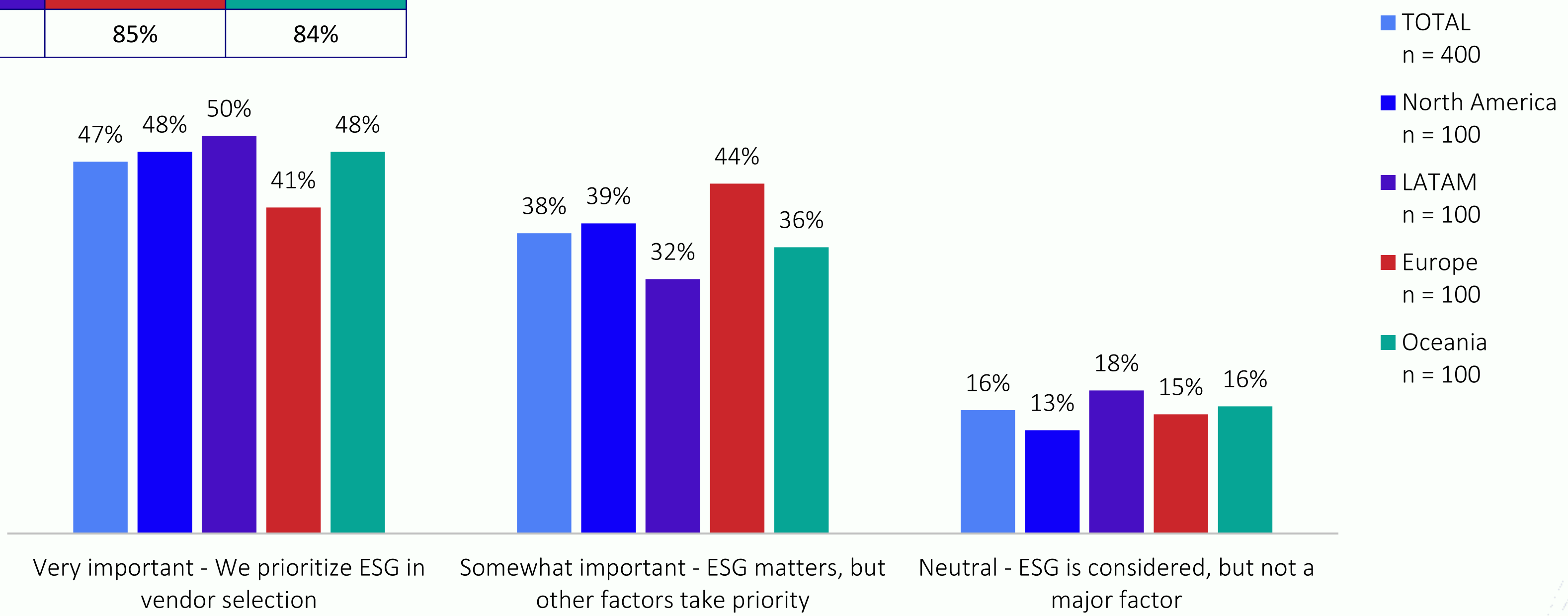
Q13. What regulatory or compliance requirements impact your connectivity and data integration strategy?
Base: All respondents = 400

Multicode question

IMPORTANCE OF SUSTAINABILITY AND ESG IN VENDOR SELECTION

The majority (85%) of organisations consider sustainability and ESG important when selecting connectivity vendors, with around half (47%) explicitly making it a key decision factor. Slightly fewer organisations in Europe (41%) put ESG at the forefront of importance.

	TOTAL n = 400	North America n = 100	LATAM n = 100	Europe n = 100	Oceania n = 100
Top 2 box	85%	87%	82%	85%	84%

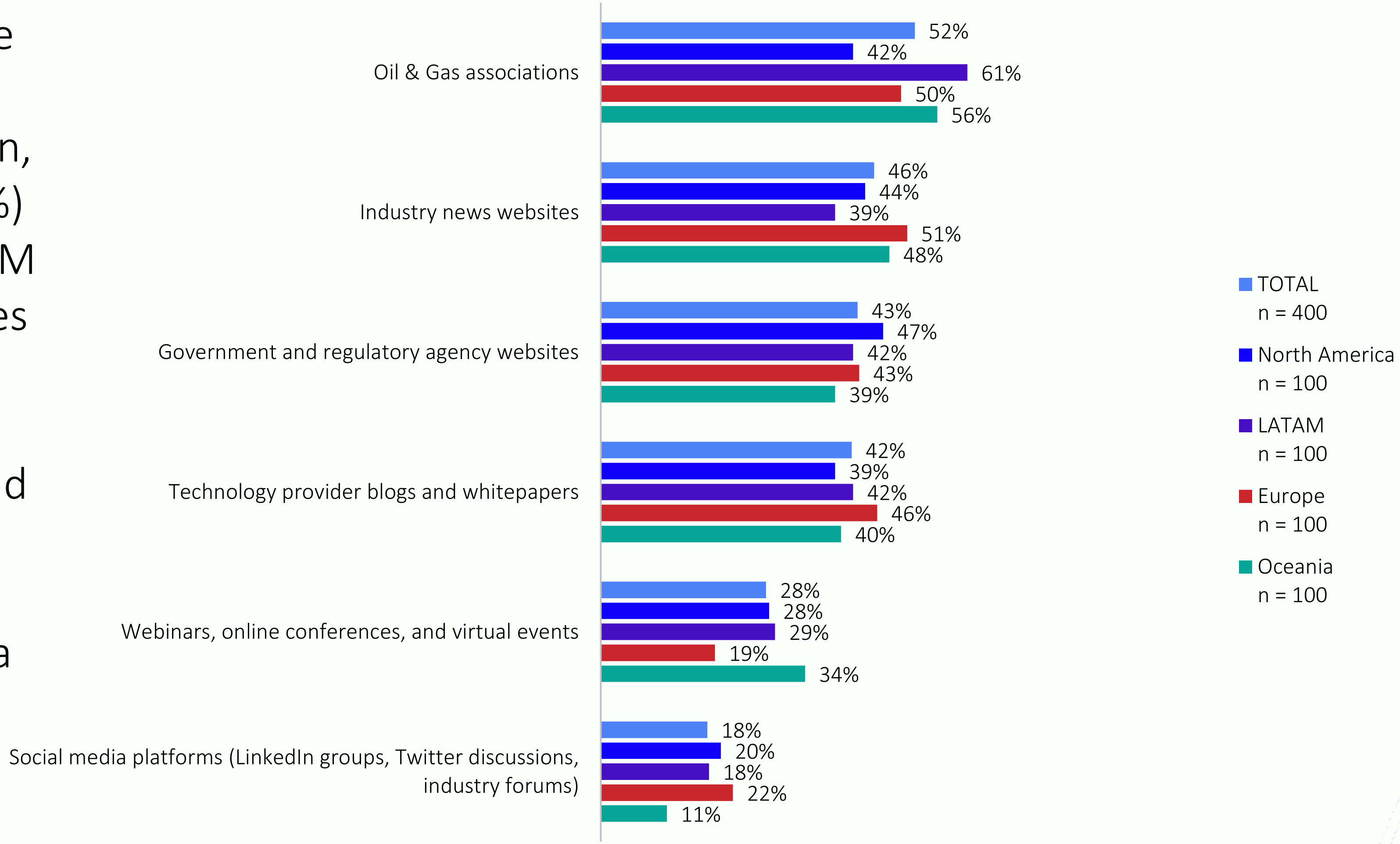


Q14. How important is sustainability and ESG (Environmental, Social, and Governance) when selecting connectivity solution vendors?
Base: All respondents = 400

Single Code question

ONLINE SOURCES FOR OIL AND GAS TRENDS AND BEST PRACTICES

Oil & Gas associations are the most frequently used source of online industry information, utilised by just over half (52%) of companies, higher in LATAM (61%). Industry news websites also remain a major source (46%). Government and regulatory websites (43%) and technology provider whitepapers (42%) are also frequently used. Social media channels have comparatively lower overall engagement.



Multicode question

Q15. Which online sources do you rely on most for staying informed about oil and gas-trends, technologies, and best practices?
Base: All respondents = 400

THANK YOU

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DELIVERING CONNECTIVITY EVERYWHERE