



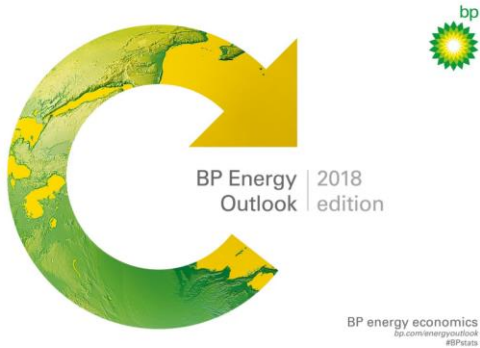
SAP in the Oil and Gas Industry

5th Iraqi-German Business Forum

Peter Schlemmer, Director Industry Business Unit Oil & Gas, SAP
March, 2019

PUBLIC

Global Energy Transition (BP Energy Outlook 2018)



- Energy consumption increases by around one third over the next 25 years.
- Industrial demand for energy accounts for around half of the increase in energy consumption
- The world continues to electrify, with almost 70% of the increase in primary energy going to the power sector
- China and India account for half of the growth in global energy demand.
- Renewable energy is the fastest-growing energy source
- The energy mix by 2040 is the most diversified the world has ever seen.
- Demand for oil and other liquid fuels gradually slows and plateaus in the later years of the Outlook.
- Production increase is initially dominated by US tight oil, but is later driven by OPEC

SAP Oil&Gas – Long term industry commitment



>70 million

Barrels per day of oil is produced by SAP's oil and gas customers

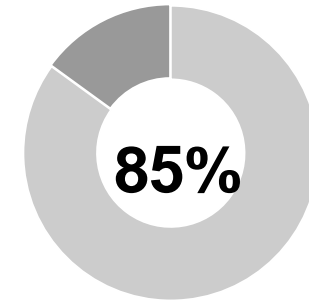
800+ O&G customers worldwide

40 years of delivering value to O&G

Deep industry-specific capabilities

Clear industry road map

Industry-driven - customer councils shaping road map and engaging in co-innovation

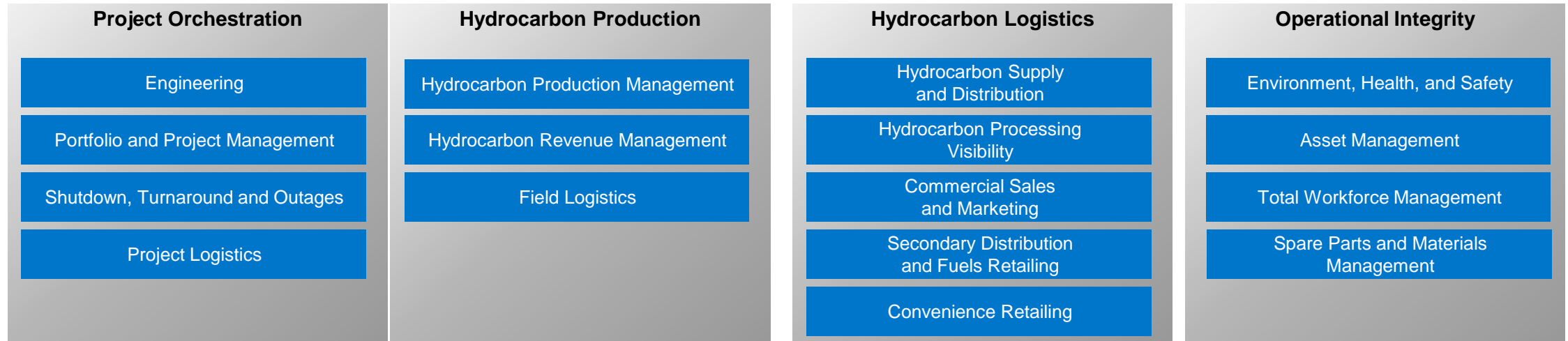


Fortune 2000
Oil & Gas

Largest O&G Companies

| | |
|-------------------|---------------------|
| ExxonMobil | Statoil |
| Royal Dutch Shell | Rosneft |
| Saudi Aramco | Lukoil |
| Chevron | ConocoPhillips |
| Gazprom | NNPC |
| BP | Ecopetrol |
| Petrobras | Schlumberger |
| Qatar Petroleum | Reliance Industries |
| Total | Phillips66 |
| YPF | Sinopec |
| ENI | Surgutneftegaz |
| PetroChina | |

Value Map for Oil & Gas



| | | | | | | |
|-------------------------|----------------------------------|---|--------------------------------|--|----------------------------------|--------------------------------------|
| Human Resources | Core Human Resources and Payroll | Talent Management | Time and Attendance Management | Human Capital Analytics | | |
| Finance | Financial Planning and Analysis | Accounting and Financial Close | Financial Operations | Treasury Management | Enterprise, Risk, and Compliance | Cybersecurity and Data Protection |
| Procurement Excellence | Sourcing and Supplier Management | Operational Procurement | Supplier Management | Inventory and Basic Warehouse Management | External Workforce Management | Services Procurement |
| | Invoice and Payables Management | Procurement Analytics | Supplier Collaboration | | | |
| Platform and Technology | Analytics | Application Platform and Infrastructure | Database and Data Management | IT Management | Security Software | IoT Business and Technology Services |

Reference Case SASREF



"TAMKEEN Project is the foundation for SASREF to achieve its vision of best-in-class performance. It is a giant leap towards becoming a full digital Refinery leveraging the cutting-edge integrated work processes from SAP. It will significantly improve our business via the real time integration and intuitive user interfaces."

Hussain Al Qahtani, President of SASREF During the Go Live celebration, November 2016

Reference Case ADNOC



EAM – PM OVERVIEW **FUNCTIONAL SCOPE W/S**

ONE
R
P

11TH FEBRUARY 2018

ABU DHABI NATIONAL OIL COMPANY