



GETI

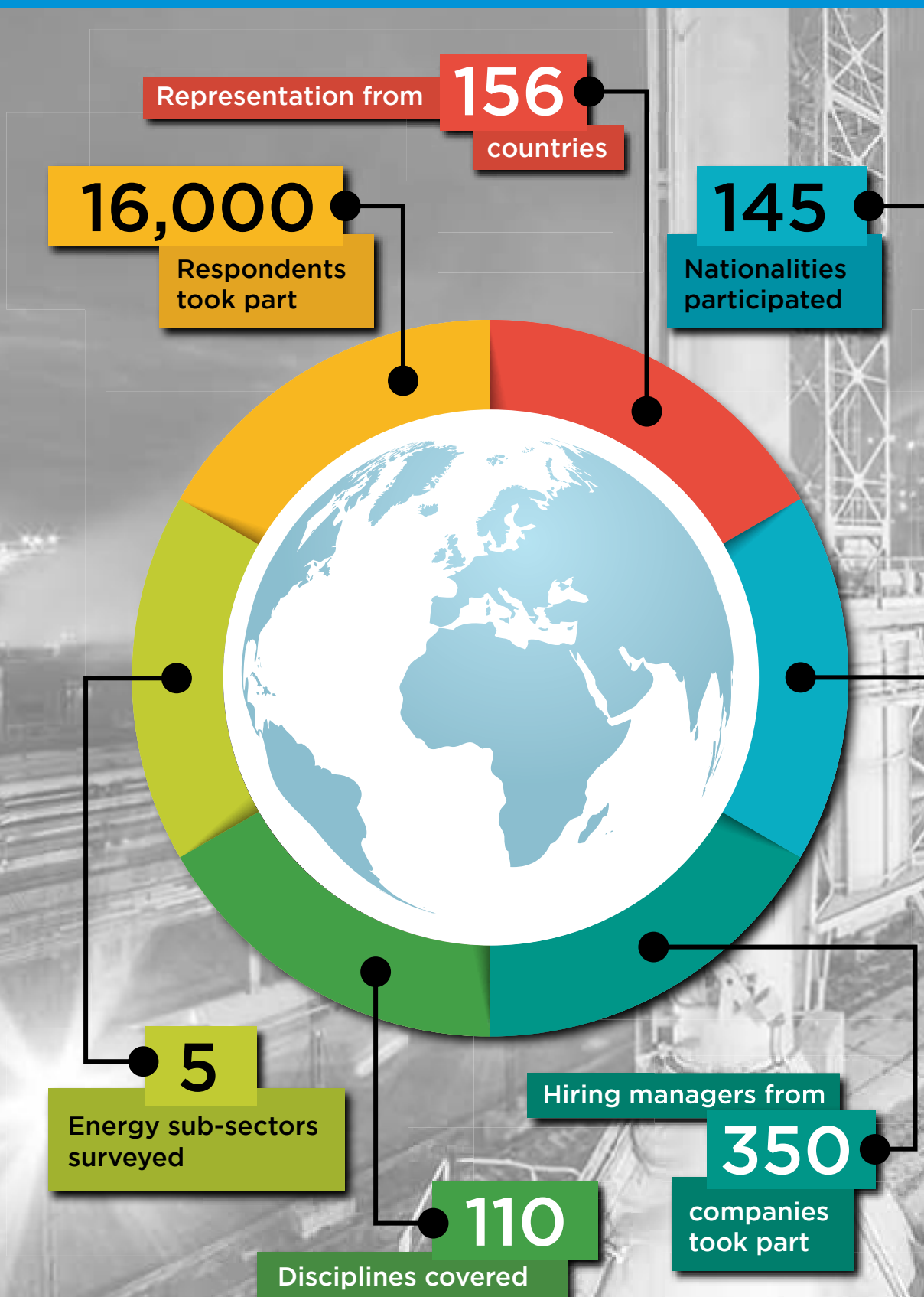
Global Energy Talent Index



The Global Energy Talent Index Report

2017

Survey Summary



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Welcome to GETI

Janette Marx, COO at Airswift and Hannah Peet, MD at Energy Jobline

Everyone at Airswift and Energy Jobline is incredibly proud to reveal the first ever GETI report.

GETI was born out of the observation that no other talent report gave a holistic view of what was really happening in the energy industries. Against a backdrop of rapid and far reaching change in the oil and gas, nuclear, renewables, chemicals and power sectors, it's important for companies and professionals to understand where the opportunities for diversification, expansion and transfer of skills exist.

We decided that the best way to provide this vital market intelligence was to gather the information directly from those in the industry.

From our daily interactions with our clients and the professionals we place, we know that there are several key areas they care about: How will salaries change in the near future? Which locations are the next energy hotspots? Which energy sectors will provide the most jobs? When I start hiring again, what will the talent pool look like?

It was these questions, and more, that we set out to answer with GETI.

There are some startling findings in the report you are about to read. The survey results reveal a disagreement between expectations of those looking for jobs and those providing them on a range of subjects, from whether salaries are due to increase to where the jobs of the future will be found.

More than anything else, these findings present an opportunity for all those in the energy industries to work together and better understand each other. As leading global workforce solution providers, we are ready and willing to help facilitate this better understanding between hiring managers and professionals and keep the energy sectors firing on all cylinders.

We would like to thank all of the respondents who took part in the survey. We look forward to bringing you many more GETI reports in the future.



Survey Methodology

GETI 2017 is the very first edition of the GETI series, a comprehensive report that will be released to the global energy industry on an annual basis. The GETI survey achieved a strong, global outreach, with 15,810 respondents completing the 32 question-long survey.

Respondents derived from 156 countries and 145 nationalities, providing Airswift and Energy Jobline with the ability to provide global and regional comparisons within the report.

The initial survey was released and held open for the duration of October 2016 and with the help of the project's partners (see Partner Directory), the survey gained the desired outreach by November 6th 2016, when it was closed.

Energy Jobline, Airswift and their data analytics teams separated and studied the survey response data, carefully dividing the answers by the demographics put in place (i.e. age, region, location, gender etc) and the energy sectors in which respondents worked.

In addition to the survey response we also analyzed key data from 64,000 job postings advertised on Energy Jobline in 2016, plus hire data from contract

and permanent placements made at Airswift over the same time period. The two partners then worked together to establish the project's key findings, as well as the trends specific to each energy sector and subsector.

Why is GETI a unique piece of research?

Airswift and Energy Jobline believe this report contains research and insight that the wider energy industries (oil and gas, renewables, nuclear, power and petrochemicals) have demanded for many years, particularly during market set-backs such as the oil and gas downturn and the uncertainty of UK government investment in nuclear.

Numerous energy salary surveys have been conducted previously. However, there was a consistent gap in knowledge around subjects such as global mobility, sector mobility and recruitment trends that the two companies agreed was their duty to investigate.

Regional comparisons have been provided where viable, to allow the various regions that responded to make comparisons around their location's current economy and industry presence.

Partner Directory

ENERGY VOICE

Energy Voice is a global, digital news platform for the oil and gas, renewables and wider energy sectors.

Based out of Europe's energy capital, Aberdeen, Scotland, Energy Voice is the authoritative voice on all North Sea developments and breakthroughs.

The platform also has a rich global scope and is read in more than 100 countries. It reports breaking news in all of the energy industry's key hubs, including Houston, Norway, Brazil, Russia, China, India and Saudi Arabia.

Energy Voice provides a diverse mix of columnists, in-depth market research, insightful analysis, exclusive video content and up-to-the-minute industry coverage all in one place.

HART ENERGY

For more than 40 years, Hart Energy editors and experts have delivered market-leading insights to investors and energy industry professionals. The Houston-based company produces award-winning magazines (such as Oil and Gas Investor, E&P and Midstream Business); online news and data services; in-depth industry conferences (like the DUG™ series); GIS data sets and mapping solutions; and a range of research and consulting services.

For information, visit hartenergy.com



Executive Summary

The Global Energy Talent Index (GETI) was developed in partnership with Energy Jobline and Airswift.

GETI examined five sectors underneath the energy umbrella – oil and gas, renewables, power, nuclear and petrochemicals and the results provide a clear picture of the energy industry's pulse. It examines the relationship between employers and the workforce, the gaps in their understanding and the crossover in their ambitions.

It identifies the regions for growth, gauges confidence levels and highlights what matters most to the energy sector's workforce.

From demographics to hiring and benefits, GETI provides the framework for the industry to forge ahead in one of its most demanding times.

Energy Jobline managing director Hannah Peet said: *"The energy sector has endured one its most eventful and volatile periods to date.*

"But with GETI we didn't want to just examine it as a whole. We wanted to disassemble the moving parts and dissect the segments. We wanted to understand what the individual risks and opportunities are regarding talent within the segments. Those sort of acute insights allows us to identify the crossover and leanings, which should be shared across the board.

"Despite challenges, energy is still one of the most exciting industries to work in. It will play a leading role in realising

the two degrees Celsius climate ambition. It continues to break down barriers and achieve world firsts."

Janette Marx, COO at Airswift, said *"GETI's results show us that there is still work to be done in terms of how, when and from where the energy industry attracts talent.*

"To preserve the pipeline of budding innovators and seasoned operators, hiring managers have to pay attention to what truly matters to the workforce.


"GETI's results show the workforce and hiring managers are not always on the same page.

"Brand no longer has the recruiting pull it once did. Employees want their companies to continue to push the energy boundaries but be equally aware of their environmental responsibilities, according to the GETI findings. The research also demonstrated that salary doesn't always reign supreme.

"Finally, GETI provides a marker for where the industry is now and what it needs to do to continue to foster and produce a coveted talent pool."

GETI examines demographics, skills, hiring, what attracts employees and global mobility, including contracting and career progression. The results are segmented into the oil and gas, renewables, power, nuclear and petrochemicals sectors. Each segment is supplemented by expert commentary.

For additional queries: enquiries@getireport.com



It looks like
the downturn
has reached
the bottom of
the cycle and
the industry
will now slowly
begin to rebuild



GETI
Global Energy Talent Index



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Energy Talent
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Oil & Gas

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Hiring



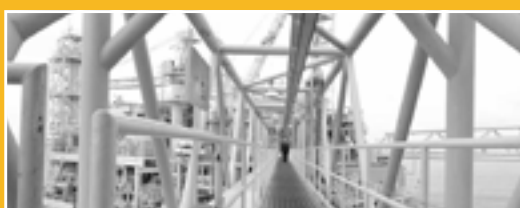
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| Executive Summary

As the oil and gas sector considers what and where next, Airswift and Energy Jobline's Global Energy Talent Index (GETI) survey examines where the opportunities are, what matters most to employees and employers and most importantly confidence levels in the 'return to growth scenario'. Key findings include:

- Young graduates shy away from wanting to be associated with the seemingly older and less eco-friendly oil and gas industry, as opposed to new technologically-driven green sectors.
- The majority of employees expect sector recovery in the next 12 months; however, hiring managers expect it to take 18 months or more.
- A robust health plan is the most sought after employee benefit.
- Employees and employers are at loggerheads about how much brand matters in attracting talent and when managers expect to hire again.

Energy Jobline managing director Hannah Peet said:

"The oil and gas sector has endured one of its most prolonged and devastating downturns to date. In the UK alone, more than 150,000 people lost their jobs with global job reductions standing at more than 400,000.

"However, borne out of that adversity was an incredibly resilient spirit from the sector. It has used the past two years to streamline its operations, shed layers of bureaucracy and ditch words like 'bespoke', opting instead for sharing of ideas and looking for economies of scale.

"After months of adhering to a circling pattern, we're starting to see slight signs of movement. For example, BP has invested heavily in its North Sea assets, committing to 50 new development wells in the region over the next three years.

"We have also seen a massive global asset reshuffle and a very healthy mergers and acquisitions market.

"When the dust settles hiring managers will need to be smart about how they attract new talent. They can no longer rely on the destructive habits of a salary bid war. GETI's findings provide a road map of what to do next."

A black and white photograph of an offshore oil rig structure, featuring a complex network of white pipes and support beams extending over the ocean. The sky is overcast. On the right side of the image, there is a vertical orange bar with a small yellow square at the top.

When the dust
settles hiring
managers will
need to be smart
about how they
attract new talent

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Return to Growth

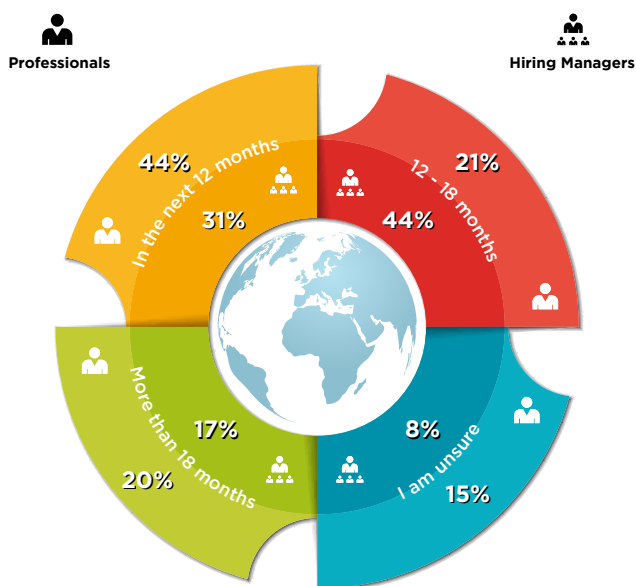
- A significant number of professionals (44%) believe that the industry will recover within the next 12 months, whilst 61% of hiring managers believe that a return is *more than 12 months* away.
- In terms of professionals expecting market recovery within 12 months, Asia was the most optimistic region (54%) followed by Africa (47%).
- 37% of hiring managers have rehired previously laid off employees. Positively, the majority of employees (73%) would return to work for their previous company.

Peter Searle, Airswift's CEO, said: "While we expect to see some recovery within the sector, we don't expect to be hitting pre-2015 levels.

"BP's chief executive Bob Dudley has been reported as saying he was building his 2017 business around an oil price of \$55 per barrel, which is where we are as of March 2017.

"Despite OPEC's historic deal to cut output levels, the workforce certainly shouldn't expect anything like \$100 per barrel oil. And that means salary and benefits will continue to adhere to a more stringent and controlled strategy."


When do you think the industry will recover?



Of the people laid off, what percentage have returned to your company? (Hiring Managers)

	Global	Africa	Asia	Australasia	CIS
None	63%	77%	44%	56%	33%
Less than 10%	31%	15%	56%	40%	33%
More than 10%	7%	8%	0%	4%	0%

	Europe	Middle East	North America	South America
None	72%	50%	58%	75%
Less than 10%	22%	33%	39%	25%
More than 10%	6%	17%	3%	0%

An aerial photograph of an industrial facility, likely a refinery or chemical plant. In the foreground and middle ground, several large, cylindrical storage tanks are visible, some with white roofs and others with dark roofs. A network of pipes and walkways connects the tanks. In the background, a city skyline with various buildings and a tall communication tower is visible under a cloudy sky. The text "The majority of employees would return to work for their previous company" is overlaid on the right side of the image in a white, sans-serif font.

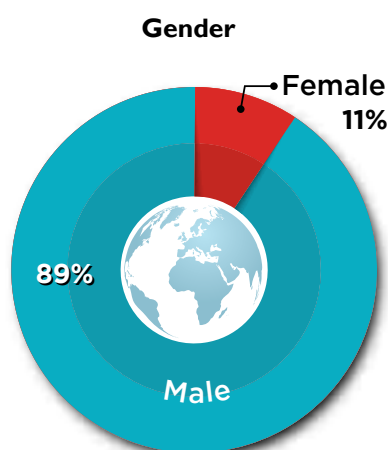
The majority
of employees
would return
to work for their
previous company

3 Survey Demographics

- Women represent only 11% of the respondents, while men made up 89%.
- Around 20% of female professionals stated their job as “administrator”, with the three most common job titles for female professionals being in support disciplines.
- Of the survey respondents, 42% of oil and gas graduates are female.

Peet said: “The sector has historically been male-dominated; however, now is the right time for the sector to address this imbalance.

“Companies need to ensure they have the correct working practices to support the attraction and retention of talented women into their workforce by understanding their key drivers. This will help to create a welcoming environment that will further open this talent sector to the oil and gas industry.”



What is your employment level? (Professionals)

	Global	Female	Male
Graduate	10%	14%	10%
Intermediate	37%	48%	36%
Senior Manager	49%	36%	50%
Vice President / Director	4%	2%	4%

Most selected job titles by male respondents (Professionals)

Project Engineer	5%
Operations and Production Operator	5%
Project Coordinator	4%
Mechanical Engineer	3%
Geophysicist	3%

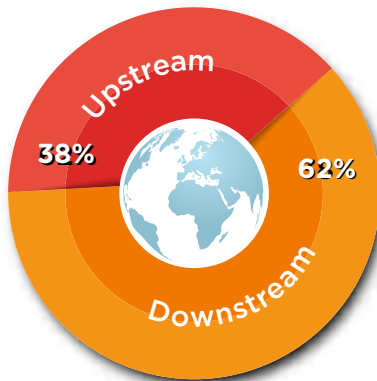
Most selected job titles by female respondents (Professionals)

Administrator	19%
Accountant	6%
HR Manager	4%
Project Coordinator	4%
Project Engineer	3%

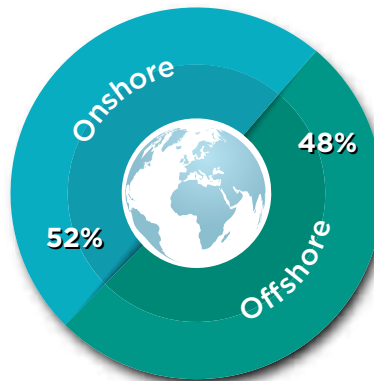
Age (Professionals)

18 to 24	2%
25 to 34	23%
35 to 44	32%
45 to 54	24%
55 to 64	16%
65+	3%

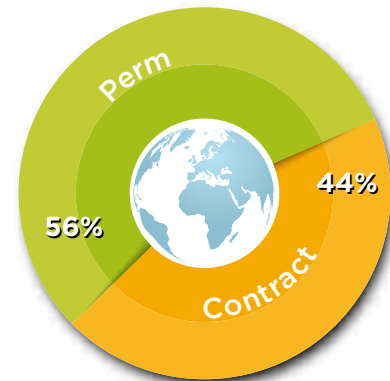
Upstream versus Downstream (Professionals)



Onshore versus Offshore (Professionals)



Contract versus Perm (Professionals)



Discipline titles (Professionals)

Project Engineer	5%
Administrator	4%
Operations and Production	4%
Project Coordinator	4%
Geophysicist	3%
Mechanical Engineer	3%
Construction Manager	3%
HSSE Manager	2%
QA/QC Inspector	2%
Electrical Engineer	2%
Maintenance Technician	2%
Commissioning Engineer	2%
Instrumentation Engineer	2%
HSSE Supervisor	2%
Process Engineer	2%
HSSE Coordinator	2%
Drilling Engineer	2%
Accountant	2%
Construction Engineer	2%
Office Manager	2%
Reservoir Engineer	2%
Maintenance Engineer	2%
Civil Engineer	1%

Nationality (Professionals)

American	17%
British	13%
Indian	9%
Canadian	6%
Australian	4%
Philippine	3%
Russian	3%
Nigerian	3%
Indonesian	3%
Pakistani	3%
Brazilian	2%
Egyptian	2%
French	2%
Malaysian	2%
Venezuelan	2%
Azerbaijani	2%
Romanian	2%
Algerian	2%
Italian	1%
Kazakh	1%

4 Skills

- Nearly three quarters of hiring managers (72%) believe that the oil and gas industry is facing a talent deficit.
- Globally, nearly half (46%) of hiring managers believe that an ageing and retiring workforce is the main contributor to a skills shortage.
- Hiring managers said changes to retention and recruitment, as well as additional training and development was needed to bridge the gap.

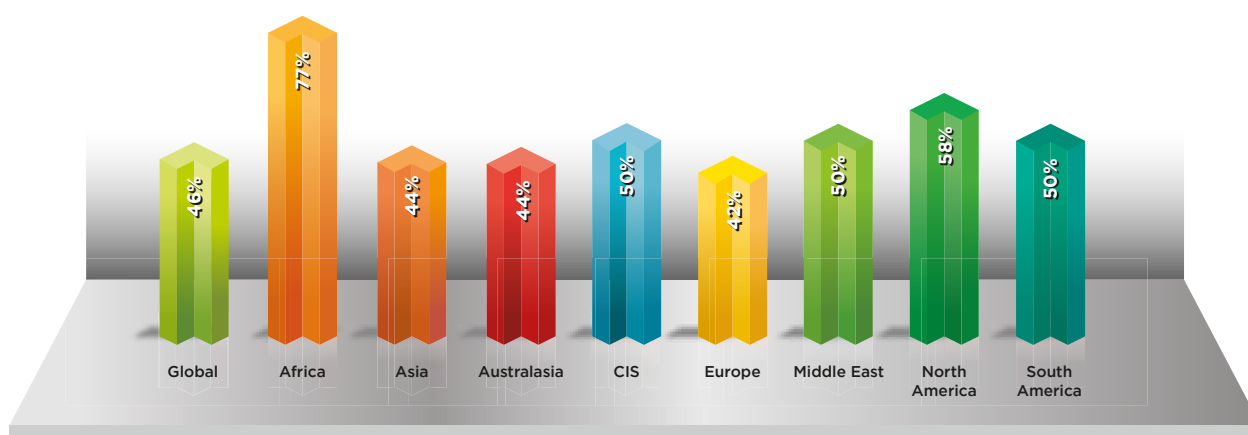
Searle said: “Like previous downturns, the oil and gas industry has been forced to cut its workforce over the past two years.

“But what we’re seeing is a stronger appetite to continue to foster and even hire young talent, especially apprentices.

“This is so essential for company future proofing and sets a strong example of the sector learning from past mistakes.”

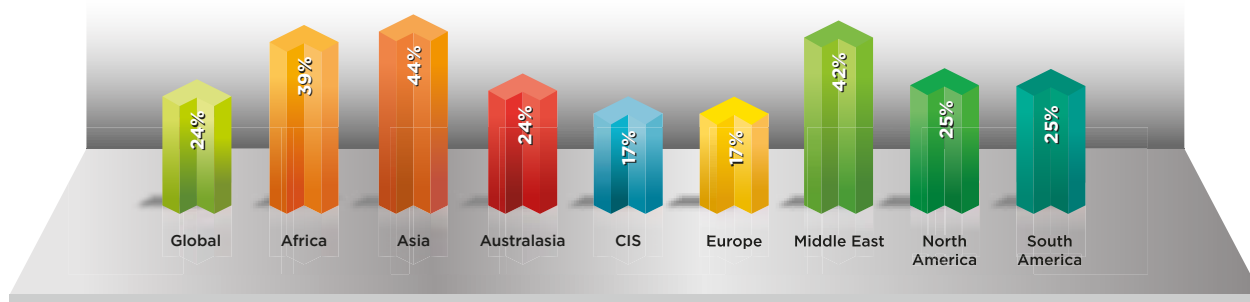
What do you feel are the key causes for skills shortages within your industry? (Hiring Managers)

Loss of manpower due to ageing, retiring workforce



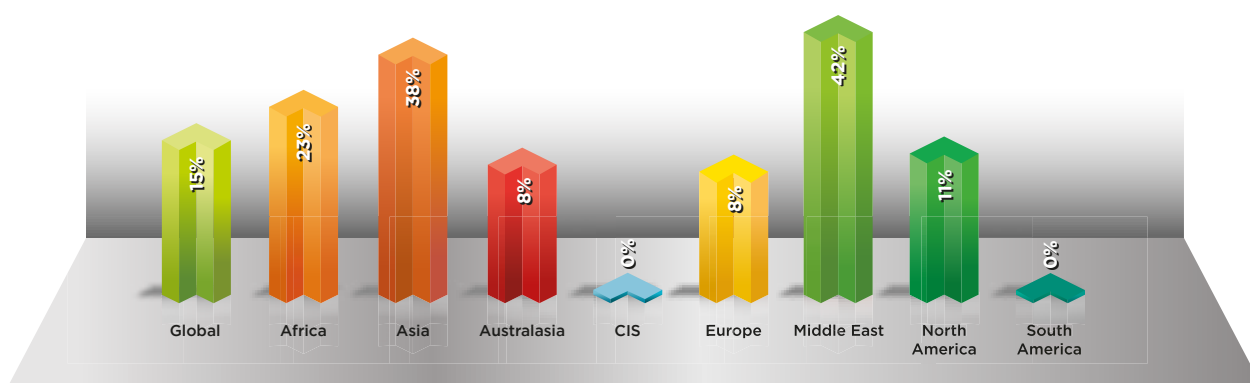
NB respondents could opt for multiple answers

The overall number of professionals entering the industry



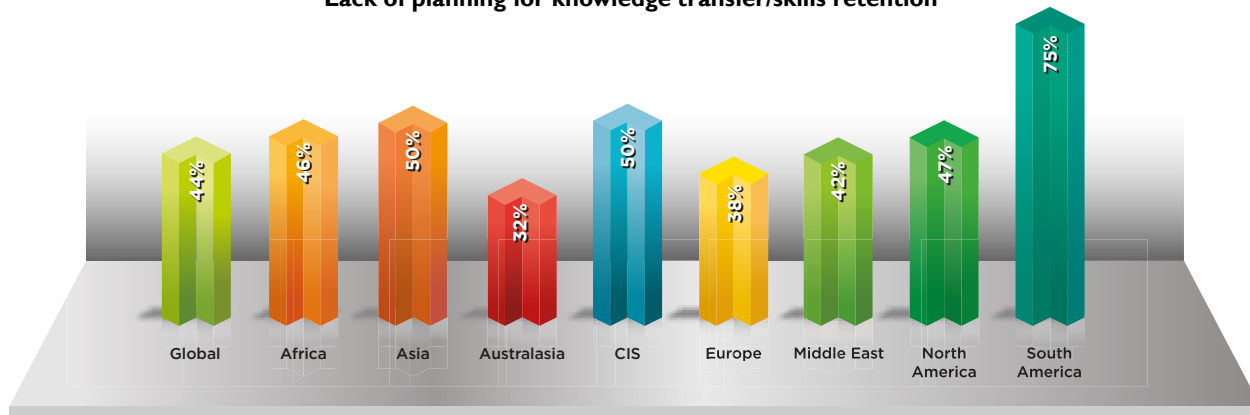
NB respondents could opt for multiple answers

Tighter immigration policies restricting access to global talent

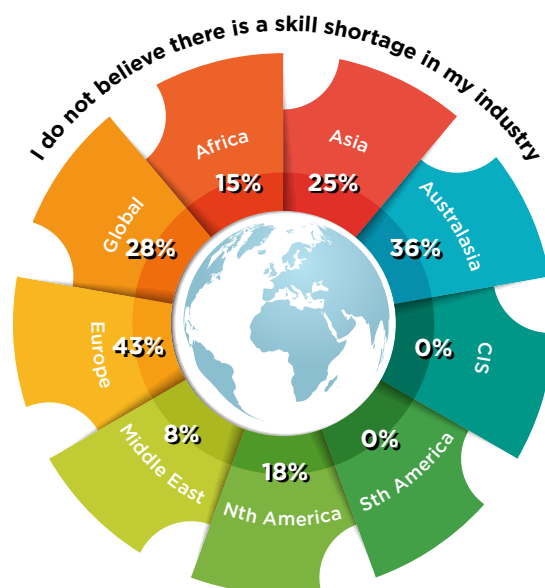


NB respondents could opt for multiple answers

Lack of planning for knowledge transfer/skills retention

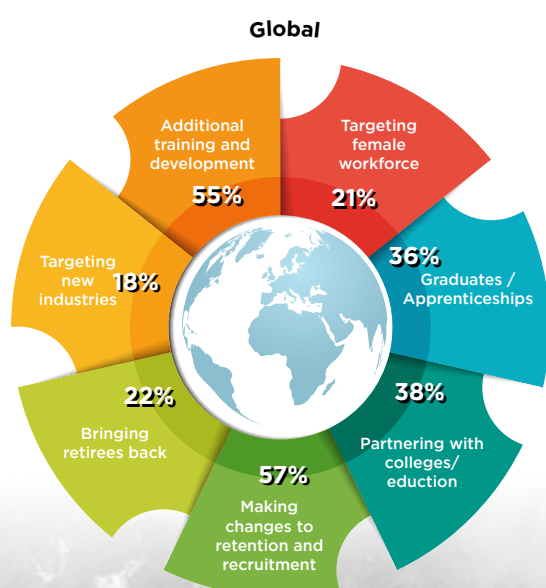


NB respondents could opt for multiple answers



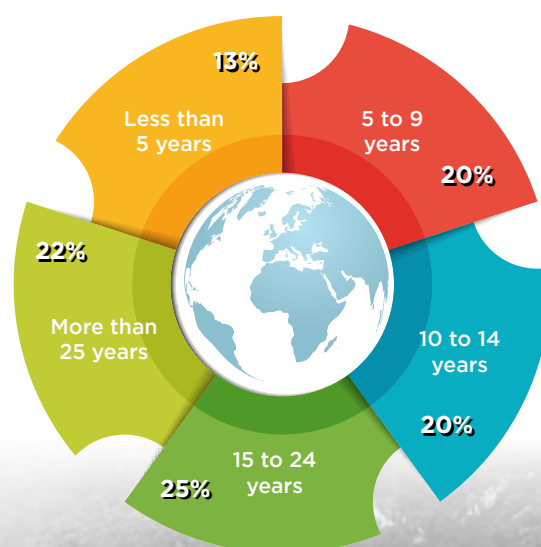
NB respondents could opt for multiple answers

How do you believe employers can overcome the skills gap? (Hiring Managers)



NB respondents could opt for multiple answers

Years of experience (Professionals)



A black and white photograph of a large offshore oil rig. The rig is a complex structure of steel beams, pipes, and platforms, rising from the ocean. A crane is visible on the left side of the rig. The sky is filled with clouds, and the ocean surface is visible in the foreground. The text is overlaid on the right side of the image.

We're seeing
a stronger
appetite to
continue to
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young talent

5 Hiring

- 62% of hiring managers said they would look to hire from other sectors.
- The majority (73%) cited a 'new way of thinking' for looking outside the industry for new talent.
- However, the overwhelming majority of hiring managers (68%) expect to hire less than 10 people over the next six months.
- Over the next 18 months the majority of hiring managers (35%) still only expect to hire less than 10 people. 23% expected to hire between 11 and 20 over the next 18 months.
- 67% of oil and gas professionals are interested in working within other energy sectors, with renewables being the most popular alternative choice.
- One of the biggest motivations to move sector (42%) was increased job security.
- Almost half of professionals (49%) would consider reducing their salary to move sector.

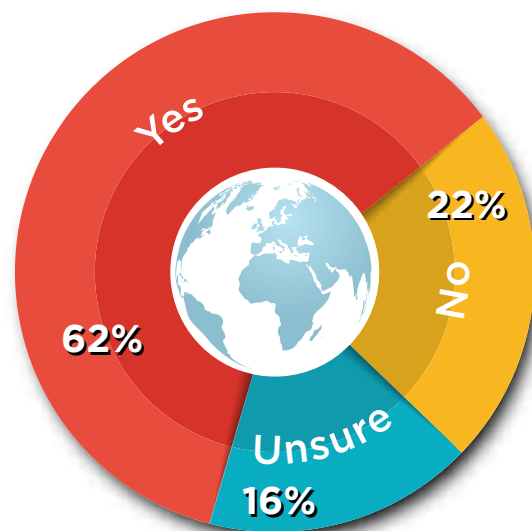
Peet said: "While the subdued hiring numbers aren't very encouraging for oil and gas professionals, the silver lining points to oil and gas' sister sectors.

"Chemical processing, in particular can draw from a highly-skilled talent pool. Other sectors shouldn't be discouraged by wondering if those hires will run at the first sign of oil price recovery.

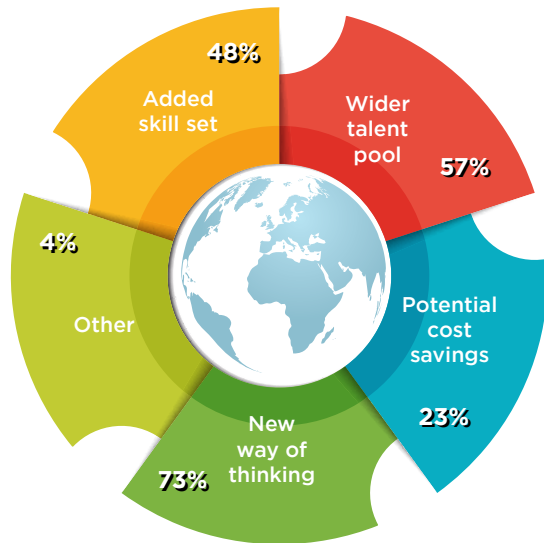
"From what we're seeing, professionals are tired of the volatility and many are ready to forego the larger salaries for more continuity in their lives.

"This is evidenced by the fact that in the last year Energy Jobline has seen a 48% increase in oil and gas professionals applying for jobs in other energy sectors."

Would you hire professionals from other energy sectors? (Hiring Managers)

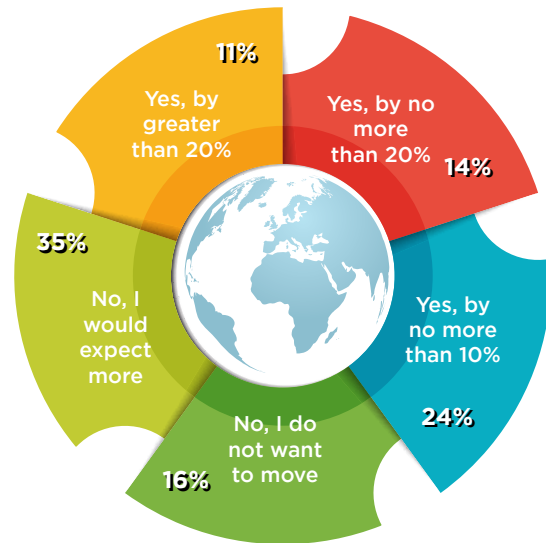


What are the advantages of hiring talent from outside your sector? (Hiring Managers)



NB respondents could opt for multiple answers

Would you reduce your salary to move to another sector? (Professionals)



In which alternative energy sector are you most interested in working? (Professionals)

Renewables	19%
Nuclear	14%
Power	18%
Chemicals	16%

What is your outlook for hiring new talent? (Hiring Managers)

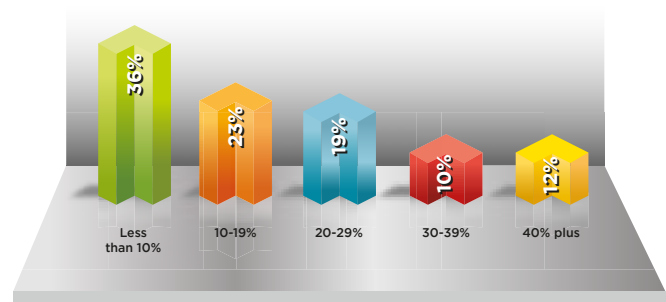
	Less than 10	11-20	21-50	51-100	101+
Next 6 Months	68%	23%	4%	4%	1%
Next 12 Months	46%	28%	17%	8%	1%
Nest 18 Months	35%	23%	20%	12%	10%

What are your reasons for changing sector? (Professionals)



NB respondents could opt for multiple answers

What percentage of your workforce have been laid off in the last 12 months? (Hiring Managers)



6

Salary and Benefits

- Nearly half of oil and gas professionals believe that salaries will increase within the next 12 months.
- The majority of hiring managers see salaries as either remaining stagnant or decreasing in the same timeframe.
- More than half of respondents globally selected 'health plan' as their most valued company related benefit.
- In North America this figure rose to 65%.

Searle said: "Despite the disparity between employers and employees on where salaries will be at the end of the year, the results do show an opportunity for the sector.

"In the past oil and gas employers allowed wages to spiral in their fight to attract and retain top talent; however, it was later made to pay for that when the oil price halved.

"The survey results show that what actually matters to employees is their health. If the sector can carve an attractive niche in terms of benefits such as health and pensions, it can still garner loyalty without always having to up the ante."

How do you think salaries and remuneration will change over the next 12 months? (Professionals)

	Global	Africa	Asia	Europe	Middle East	North America	South America
Increase	47%	55%	62%	29%	48%	48%	49%
Decrease	13%	11%	11%	19%	14%	9%	32%
Remain the same	32%	26%	23%	44%	33%	35%	14%
Unsure	8%	8%	4%	8%	5%	8%	5%

How do you think salaries and remuneration will change over the next 12 months? (Hiring Managers)

	Global	Africa	Asia	Europe	Middle East	North America	South America
Increase	47%	31%	25%	15%	25%	19%	25%
Decrease	13%	15%	25%	35%	17%	29%	25%
Remain the same	32%	54%	32%	45%	58%	50%	50%
Unsure	8%	0%	18%	5%	0%	2%	0%

Which benefits do you currently receive? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	North America	South America
Health Plan	66%	64%	71%	18%	55%	50%	73%	18%
Bonus or Commission	39%	35%	47%	27%	34%	36%	42%	27%
Transport Allowance	40%	53%	55%	17%	36%	31%	20%	17%
Training	44%	39%	39%	30%	39%	33%	37%	30%
Retirement Plan/Pensions	35%	45%	22%	26%	17%	50%	51%	26%
I do not receive any benefits	15%	12%	10%	31%	17%	24%	15%	31%

NB respondents could opt for multiple answers

Which benefit do you value the most? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Health plan	50%	49%	51%	50%	39%	31%	48%	65%	66%
Flights/Leave allowance	4%	6%	3%	4%	7%	3%	7%	3%	2%
Transport Allowance	2%	1%	3%	2%	2%	3%	1%	1%	2%
Housing/Relocation	5%	3%	4%	5%	6%	4%	11%	2%	2%
Bonuses/Commission	15%	11%	19%	15%	27%	20%	11%	13%	14%
Training	4%	9%	4%	5%	9%	5%	5%	1%	5%
Overtime pay	5%	2%	4%	4%	4%	6%	4%	5%	0%
Schooling	2%	1%	1%	2%	1%	2%	4%	1%	2%
Retirement Plan/Pension	10%	15%	7%	11%	2%	26%	7%	8%	6%
Hardship Allowance	1%	1%	1%	1%	1%	0%	1%	0%	0%
Hazardous Pay	0%	0%	0%	0%	1%	0%	0%	0%	1%
Tax Assistance	1%	2%	3%	1%	1%	1%	1%	0%	0%
Share scheme	1%	0%	0%	0%	0%	2%	0%	1%	0%

6

Salary and Benefits

Permanent salaries by region (US\$)

	Global	Africa	Asia	Australasia	Europe	Middle East	North America
Accountant	53,175	58,729	44,404	70,220	52,163	29,745	70,220
Administrator	28,976	29,091	29,753	35,110	30,094	12,910	35,110
Chemical Engineer	77,072	83,762	50,723	125,031	62,696	68,786	110,695
Civil Engineer	74,943	81,756	50,677	124,390	57,179	59,648	110,805
Commissioning Engineer	81,320	98,308	57,700	134,421	60,188	59,637	90,928
Construction Engineer	77,143	86,772	58,904	125,095	56,212	59,577	92,728
Construction Manager	103,435	105,330	71,341	183,909	76,540	132,394	111,135
Contracts Manager	90,300	96,803	60,770	133,752	70,220	132,282	90,283
Drilling Engineer	113,634	115,361	93,632	174,547	95,298	115,746	123,770
Drilling Supervisor	137,781	141,945	126,105	175,550	125,393	132,282	140,440
Electrical Engineer	78,168	83,261	58,511	124,696	60,188	60,658	110,850
Finance Manager	86,860	93,794	55,190	147,963	70,799	92,758	110,255
Geophysicist	98,027	97,806	71,239	146,459	90,283	113,043	122,777
HSE Manager	99,199	109,342	72,738	140,440	78,012	105,715	121,577
Inspection Engineer	68,667	73,229	59,511	82,765	60,188	59,523	85,267
Instrumentation Engineer	82,237	87,273	66,358	124,822	64,463	59,649	110,475
Maintenance Engineer	72,346	80,251	62,476	82,759	60,188	59,637	91,828
Mechanical Engineer	79,263	84,765	56,537	124,140	61,885	61,318	120,038
Process Engineer	85,051	88,276	67,521	128,999	62,696	68,793	121,358
Production Engineer	77,002	87,775	61,313	124,535	6,019	68,555	121,476
Project Engineer	85,545	91,286	66,824	126,519	62,696	68,555	120,377
Project Manager	113,497	124,390	75,236	170,534	82,007	132,470	150,471
QA/QC Inspector	72,986	75,236	67,752	97,806	48,151	49,605	105,330
Reservoir Engineer	112,686	113,355	102,606	124,390	100,314	123,870	130,408
Welder	53,020	67,210	37,184	78,245	41,964	16,552	80,251

Permanent salaries by company type and experience level (US\$)

	Graduate	Intermediate	Senior	Principal	Director
Consultancy	55,347	70,220	111,025	161,509	201,463
Contractor	55,173	75,399	110,346	155,487	210,660
EPC	60,188	75,236	115,841	160,503	220,691
Manufacturing	50,157	70,079	95,298	130,408	180,565
Oil Field Services	60,259	75,236	115,361	150,471	200,628
Operator	70,220	90,283	120,377	165,518	240,754

These are national and expat averages over multiple countries and cities. For specific benchmarking requests, please email enquiries@getireport.com. This report has been updated in May 2017 in line with the most up to date salary data available.

Permanent salaries by job title and experience level (US\$)

	Graduate	Intermediate	Senior	Principal	Director
Chemical Engineer	58,935	74,063	101,404	146,814	187,457
Civil Engineer	56,754	70,099	100,073	144,618	184,932
Commissioning Engineer	55,768	70,134	107,596	147,126	187,440
Construction Engineer	59,088	72,345	98,678	135,424	180,565
Construction Manager	N/A	132,282	149,465	178,719	225,464
Contracts Manager	N/A	85,736	125,296	159,442	266,218
Drilling Engineer	70,220	108,030	144,105	186,642	243,647
Drilling Supervisor	N/A	133,164	177,865	184,134	222,903
Electrical Engineer	58,935	69,098	98,643	136,791	180,946
Finance Manager	N/A	92,758	148,414	122,920	161,923
Geophysicist	58,935	85,941	129,230	175,151	215,655
HSE Manager	N/A	105,715	131,315	161,162	207,343
Inspection Engineer	50,157	63,812	85,297	118,725	148,138
Instrumentation Engineer	57,681	71,987	99,753	144,618	178,662
Maintenance Engineer	50,337	64,876	87,534	129,571	198,031
Mechanical Engineer	58,036	71,336	102,356	147,883	206,450
Process Engineer	59,870	73,565	108,765	146,686	209,620
Production Engineer	57,576	73,345	108,254	144,765	207,896
Project Engineer	57,500	73,425	105,998	145,780	183,909
Project Manager	N/A	132,030	141,942	173,703	212,925
QA/QC Inspector	N/A	57,543	78,777	109,229	140,472
Reservoir Engineer	58,071	87,394	123,530	168,458	213,601
Welder	31,348	36,740	53,409	132,694	152,598

Contractor day rates by experience level (US\$)

	Operator/Technician	Intermediate	Senior	Lead/Principal	Vice President/ Director
Global	342	352	477	592	824
Europe	286	412	574	705	882
North America	362	567	612	704	812
Asia	124	198	239	363	555
Africa	212	286	410	560	884
Middle East	266	304	336	538	829
Australasia	426	542	589	684	980

These are national and expat averages over multiple countries and cities. For specific benchmarking requests, please email enquiries@getireport.com. This report has been updated in May 2017 in line with the most up to date salary data available.

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Salary and Benefits

Contractor day rates by region (US\$)

\$ USD Day Rate	Global	Africa	Asia	Australasia	Europe	Middle East	North America
Accountant	278	242	265	272	286	275	330
Administrator	111	86	112	110	128	88	144
Chemical Engineer	444	383	462	440	480	412	484
Civil Engineer	423	365	421	423	443	411	474
Commissioning Engineer	563	489	567	531	585	545	660
Construction Engineer	448	401	442	443	453	471	478
Construction Manager	679	584	666	612	687	642	880
Contracts Manager	607	458	630	530	665	628	731
Drilling Engineer	897	826	912	888	843	905	1006
Drilling Supervisor	1180	986	1240	1050	1160	1285	1360
Electrical Engineer	562	512	564	532	586	565	612
Finance Manager	530	487	514	541	552	523	564
Geophysicist	673	631	666	640	686	701	712
HSE Manager	536	490	523	512	541	565	582
Inspection Engineer	402	363	386	401	418	424	421
Instrumentation Engineer	618	561	625	589	634	612	685
Maintenance Engineer	534	512	555	480	540	523	592
Mechanical Engineer	560	483	586	510	610	524	648
Process Engineer	592	521	585	540	621	589	696
Production Engineer	418	337	449	407	436	393	486
Project Engineer	630	590	641	601	636	624	690
Project Manager	715	665	721	687	745	701	770
QA/QC Inspector	559	488	510	514	546	578	565
Reservoir Engineer	912	812	943	864	887	880	1085
Welder	229	186	221	203	264	212	285

These are national and expat averages over multiple countries and cities. For specific benchmarking requests, please email enquiries@getireport.com. This report has been updated in May 2017 in line with the most up to date salary data available.

A black and white photograph of an offshore oil rig at sunset. The sun is low on the horizon, creating a bright glow and a long, shimmering reflection on the water. The rig's structure is silhouetted against the bright sky. The overall mood is serene and contemplative.

What people
care about
is the
corporate
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and career
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not the name
on the door

7

What Attracts Employees

- GETI reveals that over half (57%) of hiring managers believe that corporate culture and brand recognition are the main factors in attracting employees to a company.
- Only one quarter (27%) of hiring managers believe that salary is the key influencer.
- More than a third of professionals (37%) rated salary as their most important consideration when choosing which company to work for.

- Only 12% of professionals rate brand recognition as a draw.

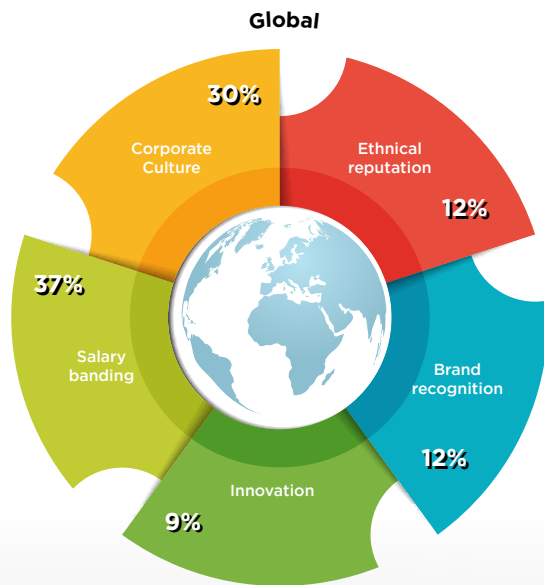
Peet said: “The survey results show us people don’t mind whether they’re working for a big brand name. What they care about is the corporate culture and career progression, not the name on the door. If companies can accomplish this they will give themselves competitive hiring edge.”

Which factors do you consider when looking for a new role? (Professionals)

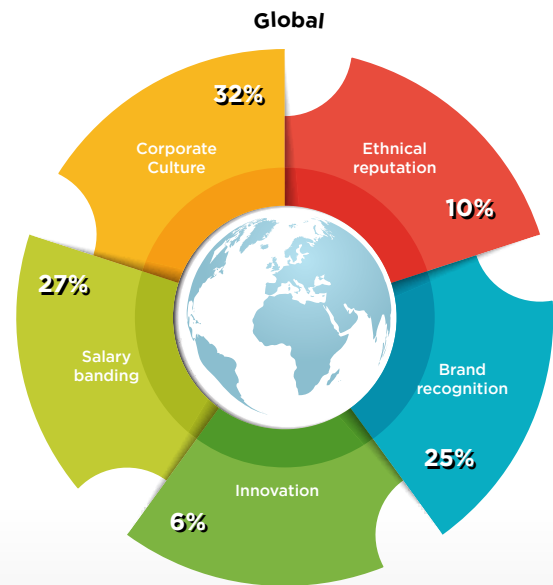
	Global	Africa	Asia	Australasia	Europe	CIS	Middle East	North America	South America
Base salary	84%	78%	85%	85%	84%	87%	87%	87%	82%
Professional Development	57%	69%	60%	47%	53%	68%	61%	50%	71%
Challenging projects	56%	62%	60%	60%	57%	55%	59%	53%	63%
Location	69%	59%	68%	71%	75%	66%	67%	76%	58%
Bonus/Commission structure	48%	44%	52%	30%	38%	58%	51%	54%	48%
Retirement Plan	34%	41%	31%	15%	30%	16%	32%	50%	31%
Home Leave/Allowance	38%	40%	51%	26%	30%	31%	54%	29%	29%
Relocation/Housing Package	34%	38%	40%	24%	26%	34%	47%	28%	33%
International Schooling	22%	33%	23%	14%	13%	39%	35%	7%	34%
Tax Assistance	17%	25%	28%	15%	13%	13%	18%	10%	17%
Hardship Allowance	13%	14%	22%	8%	7%	12%	22%	7%	13%
Share Scheme	10%	10%	13%	9%	11%	5%	9%	11%	9%
Other (please specify)	4%	4%	4%	8%	3%	3%	3%	4%	3%

NB respondents could opt for multiple answers

What do you believe attracts more employees to a company? (Professionals)



What do you believe attracts more employees to your company? (Hiring Managers)



8

Global Mobility – contracting and career progression

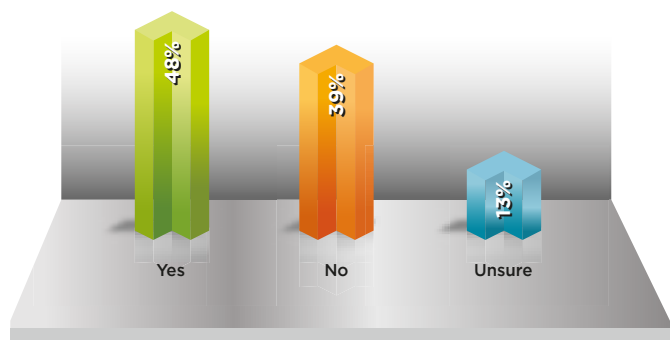
- Almost half of hiring managers (43%) indicated that diversification, into new regions or fields, could be on the agenda in the next 12 months.
- Nearly half of companies (48%) have diversified in the last 12 months.
- Just over a quarter of oil and gas professionals are expatriates.
- Nearly half of hiring managers (46%) cited the Middle East as the prominent oil and gas hot spot, compared to only 13% citing Europe.
- For professionals, North America (24%), Middle East (22%) and Europe (21%) were named as the top three places they would like to work.
- Despite the perception that oil and gas professionals are highly motivated by financial gain, almost half (49%) choose location based on opportunity for career progression.
- 44% of oil and gas professionals are in contract roles, with three quarters (77%) of contracts due to expire in the next 12 months.

Searle said: “GETI findings suggest that there is a disparity between the physical location of jobs and where candidates want to work. Currently, the hot spot regions for oil and gas jobs, according to an increase in job posting trends YOY on Energy Jobline and Airswift’s website, are CIS, Asia and South America.

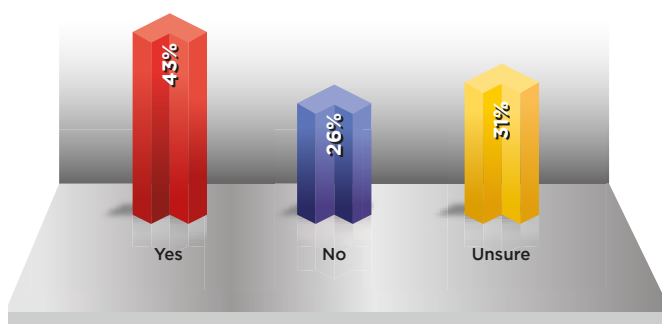
“However, according to our GETI survey, candidates do not consider these to be amongst the most desirable regions to work in.

“We also think employers should reconsider the opportunities in Europe. While the region has endured mass lay-offs, it will also develop a brand-new skills sets in areas such as decommissioning. The North Sea will be a leader in this field and those skills can be exported globally.”

**Has your company embarked on a diversification strategy in regions or other fields outside of your core business in the last 12 months?
(Hiring Managers)**



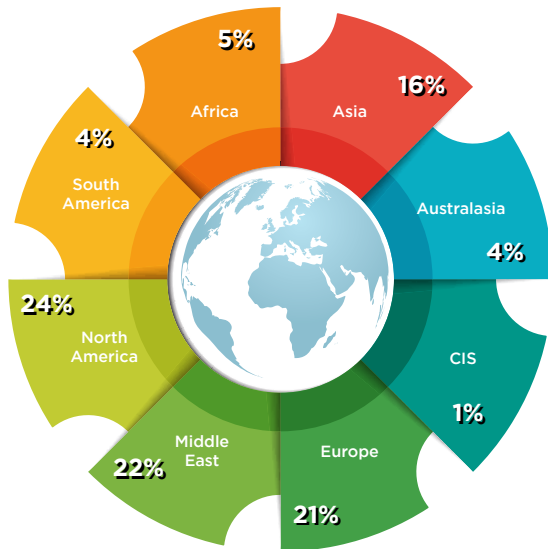
**Would your company embark on a diversification strategy in regions or other fields outside of your core business in the next 12 months?
(Hiring Managers)**



Local versus Expat

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Expat	26%	29%	13%	16%	19%	20%	86%	8%	21%
Local	74%	71%	87%	84%	81%	80%	14%	92%	79%

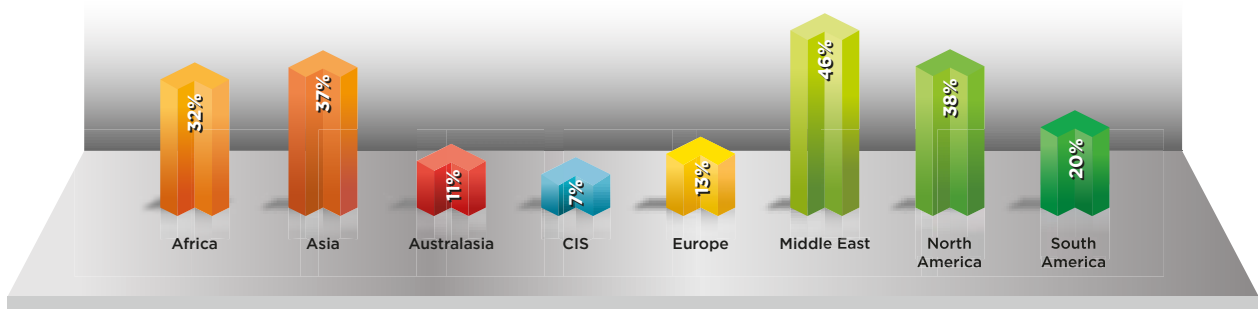
Which is your preferred region of work? (Professionals)



What are your reasons for wanting to work in your preferred region? (Professionals)

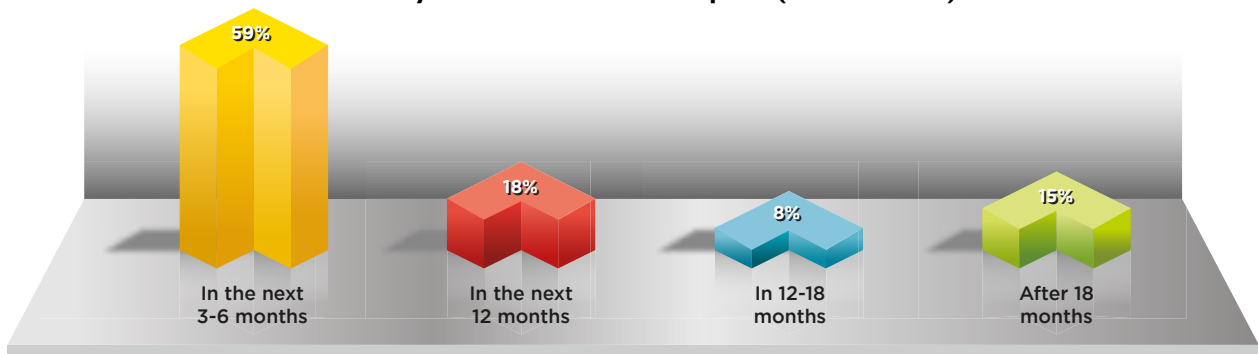


Which regions do you feel are potential hot spots across the energy industry? (Hiring Managers)



NB Respondents could opt for multiple answers

When is your contract due to expire? (Professionals)



A grayscale photograph of an industrial oil and gas refinery. In the foreground, a worker wearing a white hard hat, sunglasses, and a dark jacket is talking on a mobile phone. The background shows various industrial structures, including tall distillation columns, pipes, and storage tanks under a clear sky.

9


Final Thoughts

Searle said: *“The oil and gas industry has seen immense transformation over the past two years. From the size of companies, to the name on the door, to ownership of assets, we’ve seen sweeping changes.*

“But the one constant has been its resilience in the face of adversity. This sector has endured a string of challenges in recent months and it has used that to reshape and reinforce its efforts.

“It looks like the downturn has reached the bottom of the cycle and the industry will now slowly begin to rebuild. Unlike, other oil and gas recoveries, such as in 2009, where the industry saw a ‘basketball bounce’ recovery, this time we expect growth to come brick by brick, inch by inch.

“Hopefully with that sort of mentality and diligence it will be a recovery that affords the industry a more competitive edge than when oil was at its peak.”



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GETI

Global Energy Talent Index



The Global
Energy Talent
Index Report

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Final Thoughts



Executive Summary

The global growth of the petrochemicals sector shows no sign of abating, given the rise of the middle class in developing economies and the corresponding increase in demand for food packaging and mod-cons such as cars and washing machines with their associated petrochemical needs, according to Energy Jobline.

This, however, masks significant regional disparities and a job market recently marked by layoffs wherein some 20% of the industry let almost a third of their workers go over the last 12 months.

Against this context, Airswift and Energy Jobline's Global Energy Talent Index (GETI) survey reveals:

- A disconnect between the priorities and preferences of petrochemicals hiring managers and employees.
- Hiring managers attaching great importance to the need for training, but employees instead focused on somewhat unrealistic salary expectations and location preferences.
- A lack of planning for knowledge transfer and skills retention.
- Low levels of hiring, despite continued investment in new projects.

Airswift CEO Peter Searle said: "Our research shows the minority of hiring managers expect recruitment to pick up in the near future, with only 11% planning to hire more than 51 employees in the next 18 months.

"This subdued expectation could be driven by experience. The sudden drop in oil prices and two years of a prolonged energy downturn has seen upstream dominate headlines.

"The downstream petrochemicals sector wasn't pummelled at the same speed as its upstream sister, but it wasn't spared either as supply outstripped demand.

"However, it did learn more from the last downturn. We've seen the sector diversify, spreading its risk and learning to steady its hand. And while the market is still challenging, the downstream sector is still making some significant gains. The GETI research highlights how it can build on those."



We've seen the
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and learning to
steady its hand

2

Survey Demographics

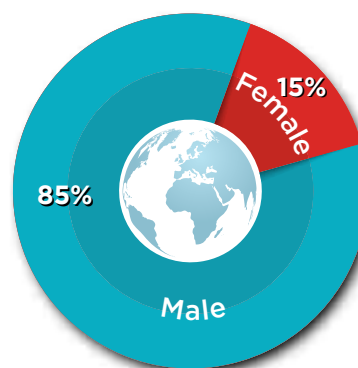
- In comparison to other energy sectors the petrochemical market has the highest representation of 18-24 years olds (6%).
- 62% of the petrochemicals sector global workforce is below the age of 45.
- Women make up 15%, of its workforce, higher than both renewables (13%) and oil and gas (11%).
- However only 31% of its female workforce is in a senior level or managerial position, compared to 38% for oil and gas, and 53% for renewables.
- The survey reveals a high level of permanent workers in petrochemicals at 72%.

Hannah Peet, managing director of Energy Jobline said: “Some might expect renewables, with its message of change, to be the sector most likely to lead the way in terms of gender equality and the nurturing of fresh young talent. But it would appear hiring managers in the petrochemicals industry may have their own reasons to claim their sector as the most progressive.”

Janette Marx, COO, Airswift added: “The survey results highlight the petrochemical industry is positioned well. While 17% is aged 55 or older – a considerable bulk of highly skilled people – the bulk of its workforce is younger than 45.

“That’s an attractive position to be in if the sector can harness the knowledge of its industry veterans and put in the practices and courses to pass that down the ranks.”

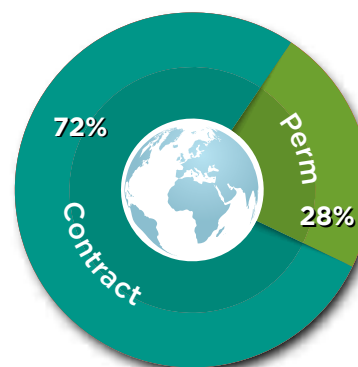
Gender (Professionals)



What is your employment level? (Professionals)

	Global	Male	Female
Graduate	14%	15%	17%
Intermediate	36%	33%	52%
Senior Manager	44%	46%	29%
Vice President / Director	6%	6%	2%

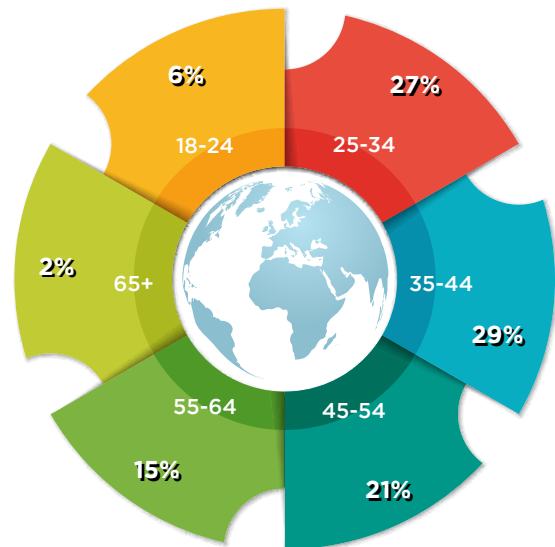
Contract versus Perm (Professionals)



Respondents by discipline (Professionals)

Engineering	19%
Petrochemicals	18%
Production	12%
Project management	11%
Pharmaceuticals	9%
Maintenance	8%
Logistics	7%
Process	6%
Research & Development	6%
Scientific	3%
Planning	2%

Age (Professionals)



Discipline titles (Professionals)

Chemical engineer	9%
Technical engineer	7%
Administrator	9%
Project coordinator	5%
Mechanical engineer	4%
Electrical engineer	4%
Maintenance technician	4%
Quality assurance	4%
Maintenance engineer	4%
Purchasing/Buyer	4%
HSSE Manager	3%
Environmental engineer	3%
Office manager	3%
Construction manager	2%
HR Manager	2%
Finance Manager	2%
Process operator	2%
Chemist I, II, III	2%
Lab manager	2%
HSSE Coordinator	2%

Nationality (Professionals)

American	23%
Indian	13%
British	8%
Canadian	4%
Egyptian	4%
Pakistani	4%
Russian	2%
South African	2%
Australian	2%
Philippine	2%
French	2%
Brazilian	2%
Venezuelan	2%
Malaysian	1%
Jordanian	1%
Zimbabwean	1%
Mexican	1%
Indonesian	1%
Chinese	1%
Saudi Arabian	1%

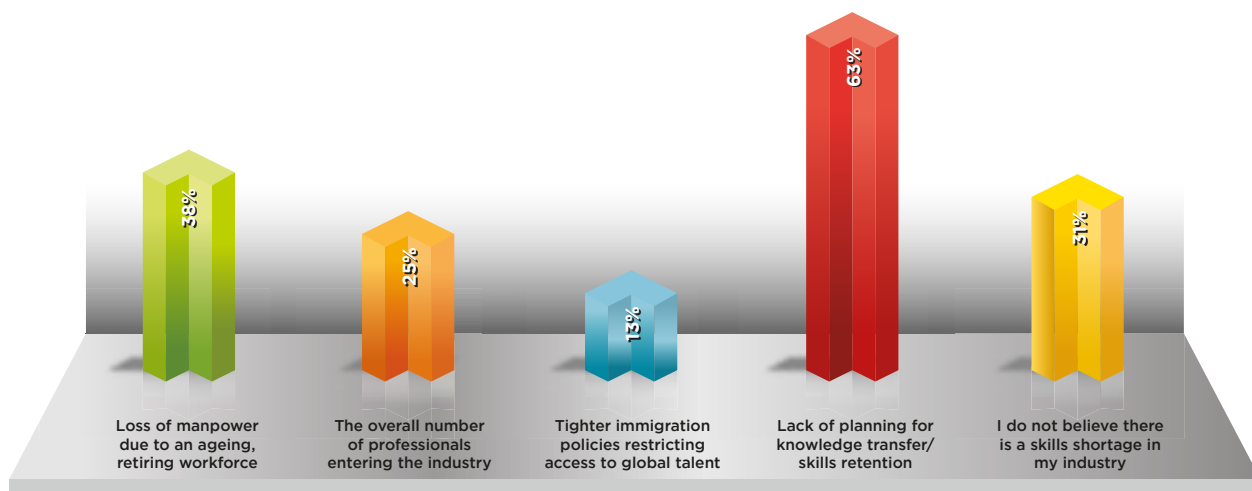
3

Skills

- Just over two thirds of hiring managers believe there is a skills shortage in the sector; in comparison to other energy sectors this is the most optimistic outlook.
- 63% of respondents cited a “lack of planning for knowledge transfer and skills retention” as being responsible for skills shortages.
- 38% cited a “loss of manpower due to an ageing workforce” as being responsible for skills shortages.

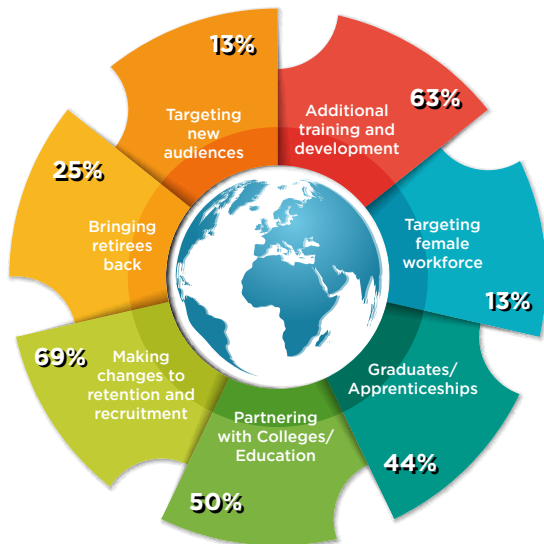
Searle said: “Despite the industry attracting a significant number of graduates, the GETI results show that the majority of hiring managers do believe there is a skills shortage. Necessary plans need to be made for adequate knowledge transfer to the younger workforce to ensure the skills gap is readdressed.”

What do you feel are the key causes for skills shortages within your industry? (Hiring Managers)

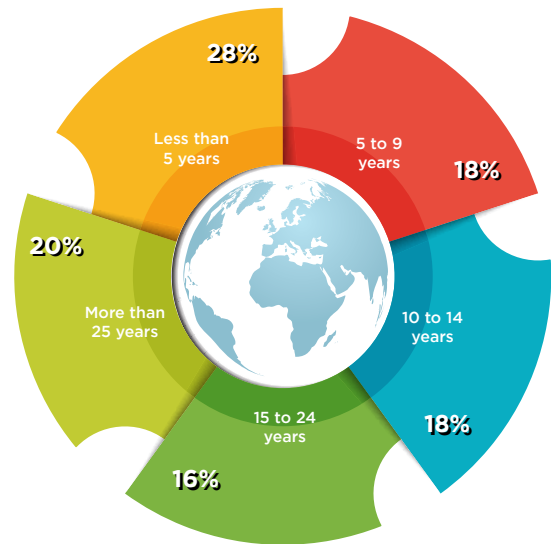


NB Respondents could opt for multiple answers

How do you believe employers can overcome the skills gap? (Hiring Managers)



Years of experience (Professionals)



NB Respondents could opt for multiple answers



4

Hiring

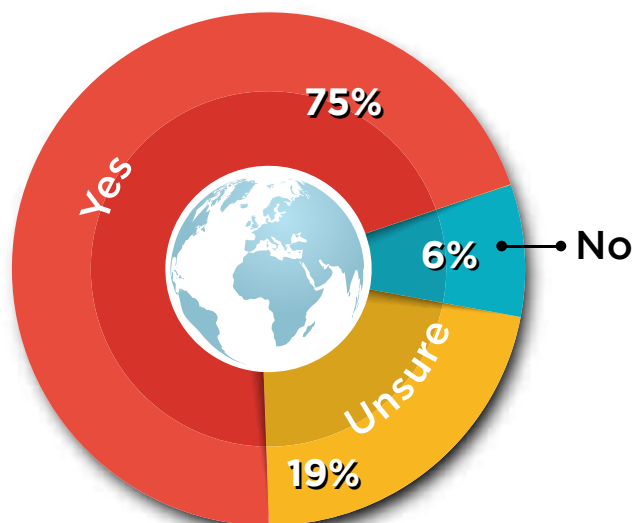
- Petrochemicals employees highlighted the oil and gas sector (22%) as their main sector of interest.
- However, two-thirds (64%) of employees would not move sector or would expect more money to do so. This is in contrast to other energy sectors.
- Three quarters of hiring managers believe hiring outside of the petrochemicals industry to be beneficial.
- The same again cited “widening the talent pool” as the most popular reason for looking externally at other energy sectors.
- On the rehiring front, two-thirds of petrochemicals hiring managers say they’d rehire professionals they’ve had to let go during the downturn.
- Nearly one in five hiring managers will be hiring 11-20 professionals in the next six months.
- A third of employers have laid off between 10- 29% of their workforce in the last 12 months.

Peet said: “This appetite from hiring managers to hire could signal a ‘light at the end of the tunnel’ for the petrochemicals sector. When it comes to recruiting, we expect downstream to steam ahead of its upstream counterpart.

“It is likely that salary considerations inform employees’ support for oil and gas, and this is borne out by the data, where the average global salary of a senior level chemical engineer in oil and gas is 68,765 compared to 60,706 for petrochemicals. Similarly, the contract day rate for a mechanical engineer is 560 in the oil and gas sector, compared to just 386 for petrochemicals.

“However, the scars are still raw for the thousands who lost their jobs in the upstream downturn. If the downstream sector continues to diversify, it could certainly be an attractive industry for employees to consider.”

Would you hire professionals from other energy sectors? (Hiring Managers)

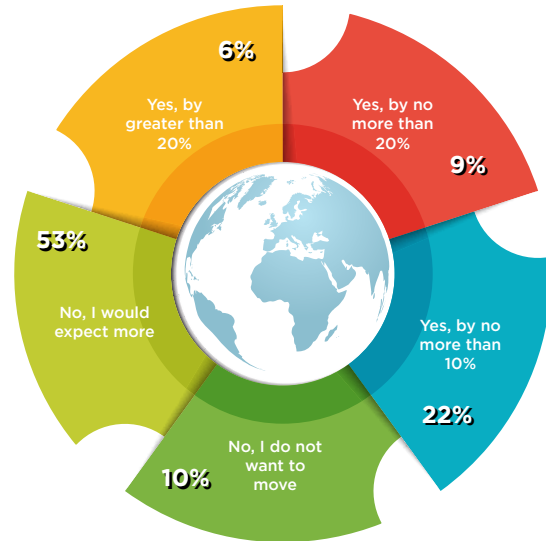


What are the advantages of hiring talent from outside your sector? (Hiring Managers)

	Global
Added skill set	50%
Wider talent pool	75%
Potential cost savings	19%
New way of thinking	69%
Other	0%

NB respondents could opt for multiple answers

Would you reduce your salary to move to another sector? (Professionals)



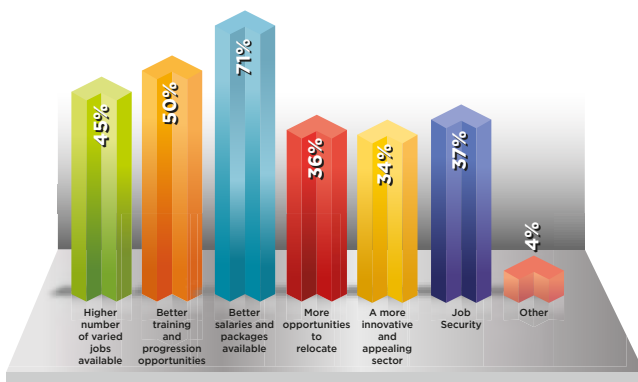
In which alternative energy sector are you most interested in working? (Professionals)

Oil & Gas	22%
Nuclear	18%
Power	19%
Renewables	16%

What is your outlook for hiring new talent? (Hiring Managers)

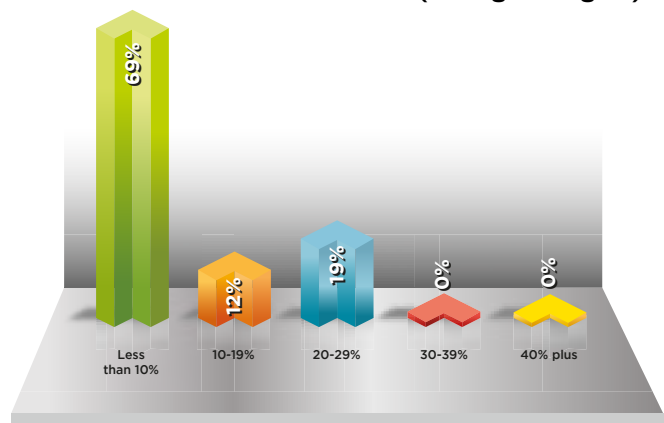
	Less than 10	11-20	21-50	51-100	101+
Next 6 Months	83%	17%	0%	0%	0%
Next 12 Months	40%	60%	0%	0%	0%
Next 18 Months	49%	40%	0%	11%	0%

What would be your reasons for changing sector? (Professionals)



NB respondents could opt for multiple answers

What percentage of your workforce have been laid off in the last 12 months? (Hiring Managers)



5

Salary and Benefits

- A majority (64%) of employees in the petrochemicals sector believe salaries will increase over the next 12 months.
- Only one in five of those doing the hiring feel the same way.
- Employee confidence is less marked in Europe, however, where only 41% reckon on salaries increasing.
- Nearly 55% of professionals view a healthcare plan as the most valuable benefit.

- 12% of renewables employees are not receiving any benefits, this figure rises to a third in South America and CIS.

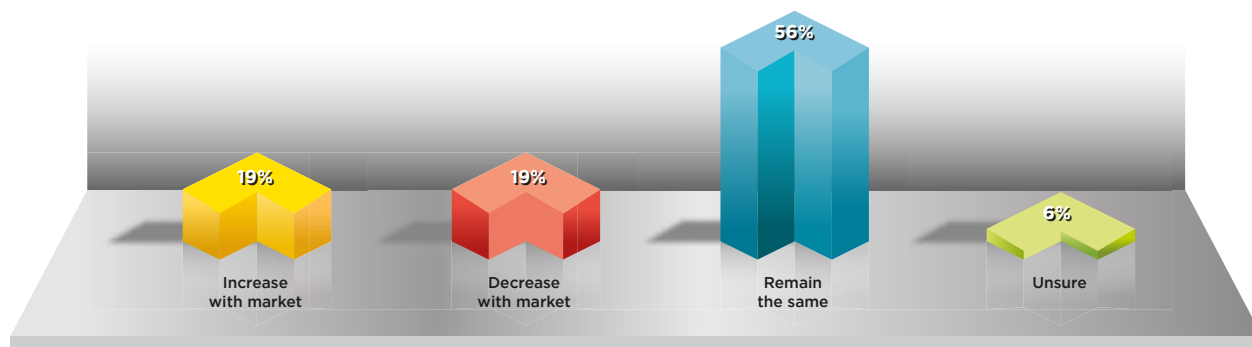
Marx commented: “When it comes to salaries, the workforce needs to be aware of where it pays to work. The average permanent annual salary for a petrochemical HSE Manager in Europe is 49,162, while in North America this rises to 70,473 and the figure for the Middle East is 50,298.

“For hiring managers in regions where benefits are not widely offered, this might present an opportunity to help attract and retain employees.”

How do you think salaries and remuneration will change over the next 12 months? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Likely to increase	64%	71%	83%	33%	45%	41%	74%	60%	85%
Remain the same	24%	16%	12%	22%	36%	39%	19%	28%	0%
Likely to decrease	5%	7%	0%	44%	9%	7%	3%	4%	8%
Unsure	7%	7%	6%	0%	9%	13%	4%	8%	8%

How do you think salaries and remuneration will change over the next 12 months? (Hiring Managers)



What benefits do you currently receive? (Professionals)

	Global	Africa	Asia	CIS	Europe	Middle East	North America	South America
Health plan	69	78	76	45	39	77	78	69
Retirement Plan/Pension	43	46	44	18	39	26	59	38
Training	43	48	47	55	39	43	38	46
Overtime Pay	35	35	25	36	20	49	35	15
Bonuses/Commission	44	43	67	55	33	55	35	31
Transport Allowance	41	48	67	45	26	77	12	23
Housing/Meal/Relocation	29	28	51	18	5	62	14	8
Flights/Leave Allowance	29	28	45	18	13	71	11	15
I do not receive any benefits	12	7	5	36	23	4	13	31
Schooling	15	26	9	36	3	32	9	31
Share Scheme	6	11	9	0	10	0	6	0
Hazardous Pay	6	13	9	18	2	6	2	8
Tax Assistance	7	13	16	9	2	3	3	0
Hardship Allowance	6	7	11	18	3	12	2	0
Meal Allowance	0	0	0	0	0	0	0	0
Commission	0	0	0	0	0	0	0	0
Relocation Package	0	0	0	0	0	0	0	0

NB respondents could opt for multiple answers

What benefit do you value the most? (Professionals)

	Global	Africa	Asia	CIS	Europe	Middle East	North America	South America
Health plan	55%	49%	62%	43%	31%	65%	64%	56%
Bonus	14%	19%	16%	43%	18%	10%	9%	22%
Retirement	11%	16%	4%	0%	22%	6%	13%	0%
Transport Allowance	3%	0%	3%	0%	9%	0%	1%	0%
Training	1%	5%	0%	0%	2%	2%	1%	0%
Flights/Leave allowance	4%	5%	2%	0%	2%	1%	3%	22%
Housing/Relocation	3%	0%	3%	0%	0%	11%	0%	0%
Hardship Allowance	0%	0%	2%	0%	2%	2%	0%	0%
Overtime Pay	5%	0%	4%	14%	11%	0%	7%	0%
Schooling	2%	4%	2%	0%	3%	3%	1%	0%
Share Scheme	1%	2%	2%	0%	0%	0%	1%	0%
Hazardous Pay	0%	0%	0%	0%	0%	0%	0%	0%
Tax Assistance	1%	0%	0%	0%	0%	0%	0%	0%

NB respondents could opt for multiple answers

Permanent salaries by region (US\$)

	Global	Africa	Asia	Australasia	Europe	Middle East	North America
Chemical Engineer	60,706	44,398	68,698	58,403	63,304	56,645	72,787
Technical Engineer	43,456	25,486	39,585	58,753	36,319	42,347	58,247
Administrator	35,401	24,759	36,631	46,428	36,654	33,481	34,453
Project Coordinator	43,490	11,656	37,259	61,797	64,086	36,225	49,914
Mechanical Engineer	71,182	41,734	64,855	96,278	59,473	69,357	95,398
Electrical Engineer	65,933	45,250	70,312	67,875	64,477	75,193	72,489
Maintenance Technician	38,487	13,411	37,766	62,702	34,452	36,725	45,865
Quality Assurance Manager	69,391	45,172	66,835	71,539	66,880	61,086	104,832
Purchasing Manager	68,153	42,996	63,633	80,688	63,663	58,148	99,790
Health and Safety Manager	54,170	38,267	47,016	69,803	49,162	50,298	70,473
Environmental Manager	44,337	26,652	41,415	61,486	31,255	44,291	60,923
Office Manager	39,239	24,755	36,631	46,454	36,657	33,480	57,458
Construction Manager	56,559	39,312	48,306	71,710	41,556	51,677	86,791
HR Manager	65,283	47,022	69,609	66,835	69,639	63,594	75,000
Finance Manager	72,705	51,865	76,778	70,889	76,812	70,143	89,741
Process Operation Production Manager	62,820	46,205	56,798	84,268	59,375	60,735	69,541
Chemist	58,164	24,760	62,899	53,807	56,960	67,277	83,281
Lab Manager	55,171	21,297	63,859	78,934	42,547	56,894	67,496
Planner	48,425	18,516	47,036	69,815	42,596	50,310	62,279
Process Engineer	278	281	302	270	250	289	276

All rates besides US were converted using Google

Contract day rates by region (US\$)

USD	Global	Africa	Asia	Australasia	Europe	Middle East	North America
Chemical Engineer	406	345	406	398	432	376	475
Technical Engineer	333	276	319	322	343	332	403
Administrator	186	153	172	182	203	166	242
Project Coordinator	356	289	347	364	367	355	413
Mechanical Engineer	386	332	380	393	403	372	436
Electrical Engineer	382	317	372	395	398	380	429
Maintenance Technician	237	205	220	244	252	237	263
Quality Assurance Manager	395	363	400	385	411	394	421
Purchasing Manager/Buyer	359	322	351	367	372	359	380
HSE Manager	417	391	413	416	419	429	437
Environmental Manager	333	300	333	319	348	346	354
Office Manager	208	172	208	207	229	192	239
Construction Manager	423	398	425	417	428	429	434
HR Manager	213	183	211	208	235	202	241
Finance Manager	341	300	325	338	348	335	393
Process Operator	351	324	348	345	351	354	387
Chemist	228	208	231	221	234	224	250
Lab Manager	239	221	237	237	238	239	261
Planner/Scheduler	259	233	251	261	263	265	278
Process Engineer	278	250	270	276	281	289	302

Permanent salaries by job title and experience level (US\$)

USD	Graduate	Intermediate	Senior	Principal	Director
Chemical Engineer	38,250	47,572	60,706	71,310	84,380
Technical Engineer	30,303	37,228	43,456	55,524	64,218
Administrator	24,705	31,465	35,401	44,832	56,953
Project Coordinator	26,917	33,671	43,490	57,223	69,579
Mechanical Engineer	51,101	63,339	71,182	95,864	115,547
Electrical Engineer	43,315	54,382	65,933	86,731	104,033
Maintenance Technician	29,103	33,620	38,487	47,997	63,599
Quality Assurance Manager	50,916	60,415	69,391	90,540	112,420
Purchasing Buyer	32,585	39,989	50,280	62,610	72,280
HSE Manager	40,012	48,050	54,170	66,414	80,041
Environmental Manager	32,594	39,637	44,337	56,671	68,014
Office Manager	31,708	34,857	39,239	51,118	62,586
Construction Manager	41,274	49,151	56,559	68,450	84,613
HR Manager	48,143	57,765	65,283	79,324	92,983
Finance Manager	49,845	63,360	72,705	90,165	105,360
Process Operator	42,066	52,461	62,820	78,449	94,419
Chemist	39,156	47,894	58,164	73,608	88,815
Lab Manager	36,120	46,330	55,171	69,728	81,212
Planner/Scheduler	33,338	41,110	48,425	62,245	74,441
Process Engineer	39,472	46,917	58,977	71,551	85,115



6

What Attracts Employees

- A third of employees are attracted to a company by salary banding (33%) followed closely by ethical reputation (23%).
- More than half of employees believe the stricter regulations on the chemical industry will have a positive longer term effect on the industry.
- However, hiring managers are less confident on the impact of stricter regulations. More than three quarters were unsure or thought they would have a negative impact.
- Only 1 in 10 hiring managers acknowledged salary as being important, with half pointing to corporate culture as the most compelling draw.

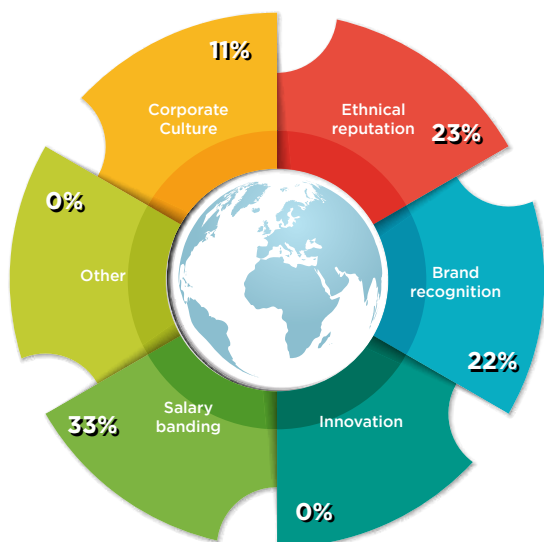
- A company's brand is more important to petrochemical employees than those in other energy sectors.

Peet said: "Employers and employees are on opposite sides of the spectrum when it comes to salary expectations, but have found common ground with views on ethical reputation."

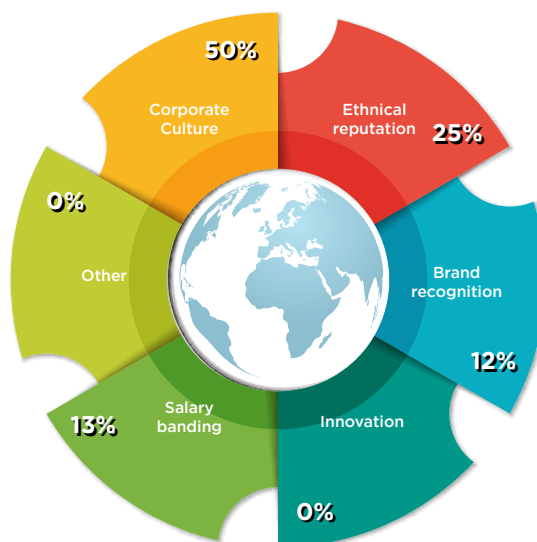
"The days of clocking in and out are fading fast. Employees want to work for a company with a good ethical reputation, which fosters honesty and supports transparency where it can. It's encouraging to see the survey results highlight this as a mutual understanding between hiring managers and professionals."

Marx added: "Stricter regulations in the industry can only be good for the industry and its great to see this further enhances the reputation of the industry."

What do you believe attracts more employees to a company? (Professionals)



What do you believe attracts more employees to your company? (Hiring Managers)

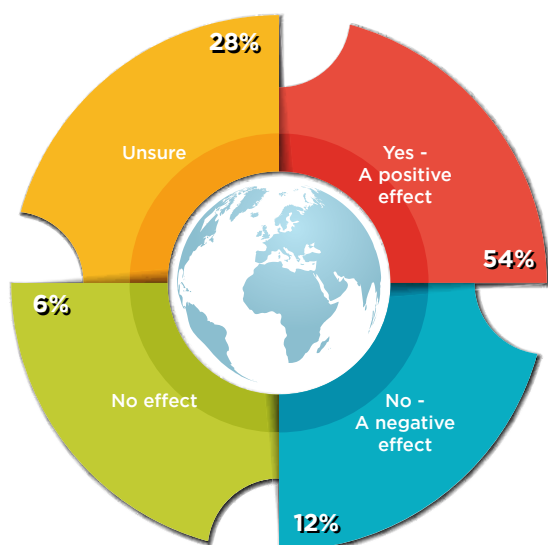


Which factors do you consider when looking for a new role? (Professionals)

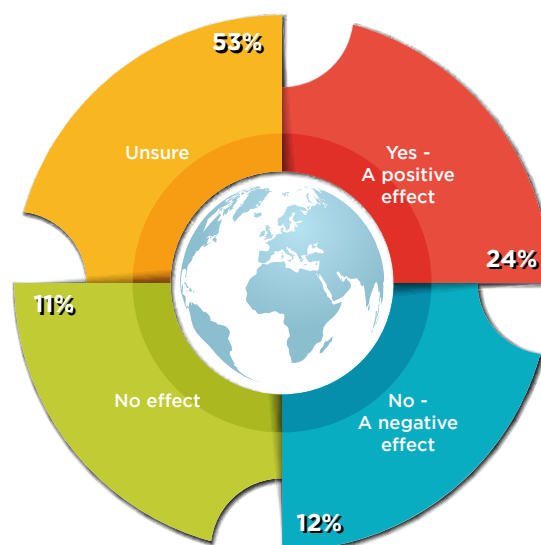
	Global	Africa	Asia	CIS	Europe	Middle East	North America	South America
Base salary	87	91	87	64	90	89	88	69
Location	68	59	65	55	83	59	74	62
Challenging projects	60	57	69	82	56	55	59	77
Professional Development	64	77	81	64	54	64	54	92
Bonus/Commission structure	51	48	63	45	36	61	53	31
Retirement Plan	43	34	50	18	37	41	52	46
Relocation/Housing Package	35	30	44	45	24	52	32	8
Home Leave/Allowance	36	25	56	27	22	55	32	0
Tax Assistance	18	27	27	9	12	20	14	8
Other (please specify)	5	9	4	0	2	6	6	0
Hardship Allowance	13	7	31	9	10	17	8	8
Share Scheme	13	20	21	9	17	11	9	0
International Schooling	25	27	50	27	17	39	4	0

NB respondents could opt for multiple answers

As regulations in the industry become stricter, will these have a longer-term effect on the future of the industry? (Professionals)



As regulations in the industry become stricter, will these have a longer-term effect on the future of the industry? (Hiring Managers)



7

Global Mobility – contracting and career progression

- Hiring managers see the Middle East (56%), and North America (50%) as preferred regions, yet many employees remain focused on Europe (28%).
- Meanwhile, when it comes to reasons for professionals wanting to work in their preferred region, reassuringly, the most popular response (56%) was “better career or progression opportunities”.
- North American petrochemicals may be leading the charge but a figure of 93% tells us it recruits almost exclusively from within the region.
- A third of employees are contract workers with just over half of contracts finishing in the next 3-6 months.

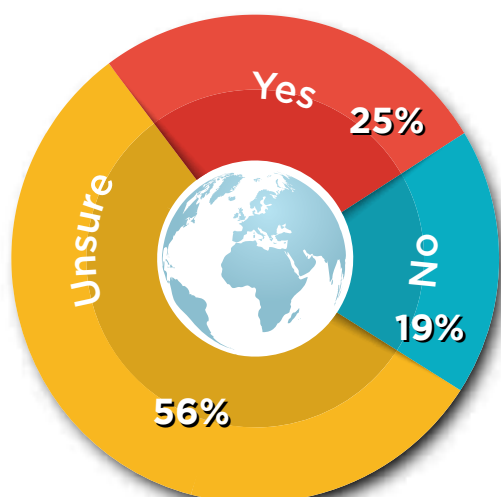
Marx said: “The GETI survey reveals that each region has its own unique set of dynamics being brought to bear, with global statistics only telling part of the story.

“North America and the Middle East enjoy proximity to natural gas feedstocks, in the latter’s case at advantaged prices, which has allowed its petrochemicals sector to prosper. Yet, in North America there is large domestic demand and new shale gas supply has allowed for significant expansion of the Gulf Coast petrochemicals cluster. And the Middle East is likely to be more subject to market forces going forward, raising the importance of increasing operating and functional efficiency. An obstacle to this, however, could be the severe shortage of qualified graduates or experienced candidates needed to build up managerial and technical capabilities, a situation exacerbated by the fact that only 15% of the workforce is local.

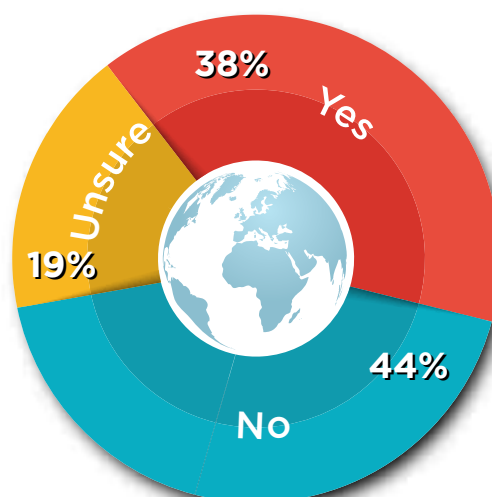
“The percentage of local employees in North America is likely to be exacerbated by the agenda of the new US Trump administration, no doubt a contributing factor in over 56% of hiring managers seeing the Middle East as a preferred region.

“Hiring managers in North America may be compelled to look to other sectors domestically, by way of invigorating the petrochemicals labour pool.”

**Would your company embark on a diversification strategy in regions or other fields outside of your core business in the next 12 months?
(Professionals)**



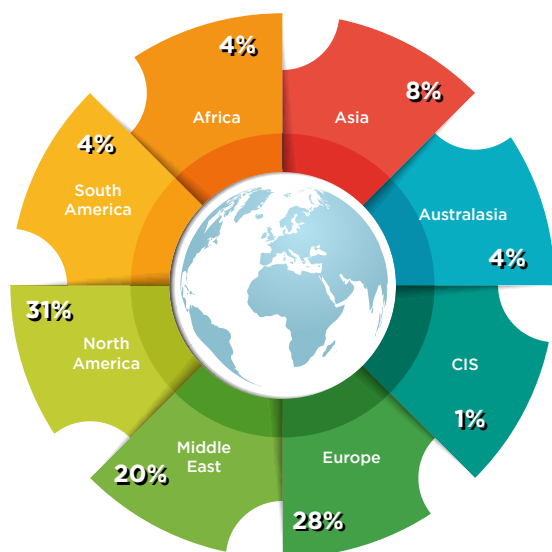
**Has your company embarked on a diversification strategy in regions or other fields outside of your core business in the last 12 months?
(Hiring Managers)**



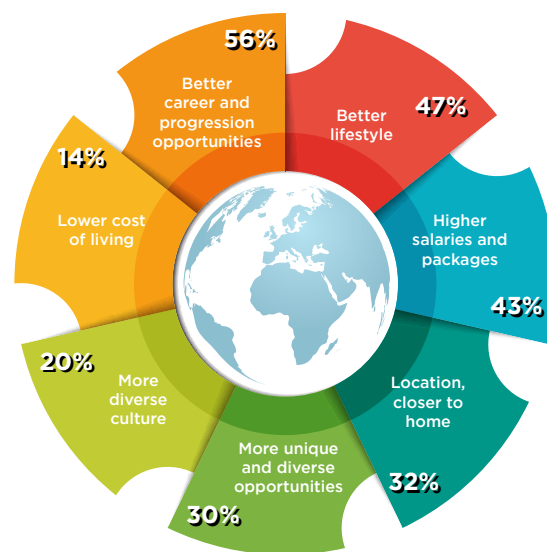
Local versus Expat

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Expat	26%	27%	17%	38%	17%	15%	85%	7%	6%
Local	74%	73%	83%	62%	83%	85%	15%	93%	94%

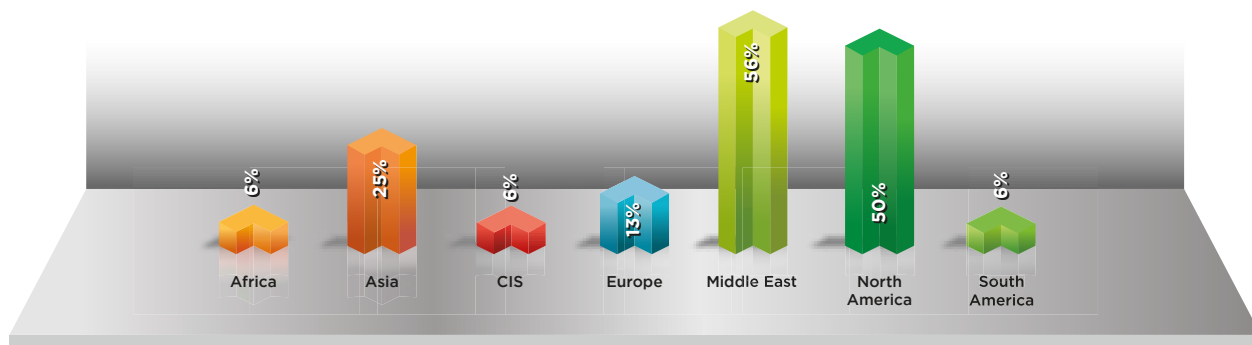
Which is your preferred region of work? (Professionals)



What are your reasons for wanting to work in your preferred region? (Professionals)



Which regions do you feel are potential hot spots across the energy industry? (Hiring Managers)



NB respondents could opt for multiple answers

When is your contract due to expire? (Professionals)





8

Final Thoughts

Marx said: *“For those prepared or compelled to live the life of an expat by way of following opportunity, it is the Middle East and Asia which would appear to offer the greatest prospects. For US residents, the petrochemicals industry is starting to pick up, so they can look to their own backyard.*

“Those wishing to work in Europe may have to revise their salary expectations or seize training opportunities where they present themselves.

“Also, an increased flexibility from petrochemicals professionals in terms of location and salary, and a willingness to undertake much needed training is likely to enhance employment prospects in what is a hirer’s market.

“Equally, increased recognition from employers of the importance of salary and benefits to employees, and of the close relationship between petrochemicals and oil and gas, could create the conditions for specific skills shortages to be addressed both swiftly and efficiently.”



A company's
brand is more
important to
petrochemical
employees than
those in other
energy sectors



GETI
Global Energy Talent Index



energyjobline

The Global
Energy Talent
Index Report **2017**

Power

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Final Thoughts



Executive Summary

The global power sector is in a period of rapid change that will pose considerable operational challenges for many years to come. Megatrends such as climate change and population growth place unprecedented new pressures on the industry. The outlook is further complicated by the need to upgrade ageing energy infrastructure in many locations and by security of supply concerns, stemming from geopolitical issues.

Against this background, new research carried out by Airswift and Energy Jobline reveals various industry trends and insights that could help guide company boards and hiring managers. Key findings about the power sector from the Global Energy Talent Index (GETI) survey include:

- A desire for more graduate/apprenticeship schemes amid concern about a skills gap and low level of new entrants.

- A huge gender imbalance: women account for under 8% of the workforce.
- Europe has the least optimistic outlook for pay with some workers fearing salaries could even fall.
- Hiring managers see Asia, the Middle East and North America as key hot spots.

The power sector is changing and this report highlights some of the changes that companies within it might benefit from making.

Airswift's COO Janette Marx said: *"The power sector may have a complicated backdrop; however, there are some very realistic opportunities on the horizon."*

"According to our research, the first step in capitalizing on those opportunities is getting employers and employees on the same page about what matters most."



The first step is
getting employers
and employees
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page about
what matters most

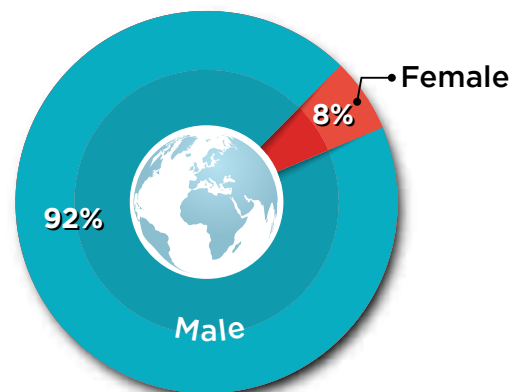
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Survey Demographics

- The most represented age group among respondents was 25 to 34 (30%), just ahead of 35 to 44 (29%).
- Only 8% of power industry respondents were women, even lower than in oil and gas (11%) or nuclear (9%).
- Despite this stark gender imbalance in terms of numbers, more than half the women surveyed (55%) indicated that they were in senior or managerial roles – the same percentage as for men.
- Respondents were most likely to be located in the US (13%), UK (9%), India (8%) and Saudi Arabia (8%).
- In terms of nationality, India topped the list with 15%, followed by American (12%), British (10%), Pakistani (5%) and Egyptian (5%).
- Permanent positions make up 64% of the power industry with 36% contracting.

Marx noted: “Similar to its sister sectors, the power industry must do more to rebalance the gender skills base, although its promising that women are progressing to more senior roles within the industry and this should be seen as a big incentive to females entering the industry.”

Gender (Professionals)



What is your employment level? (Professionals)

	Female	Male
Graduate	6%	11%
Intermediate	36%	28%
Senior Manager	55%	55%
Vice President / Director	3%	6%

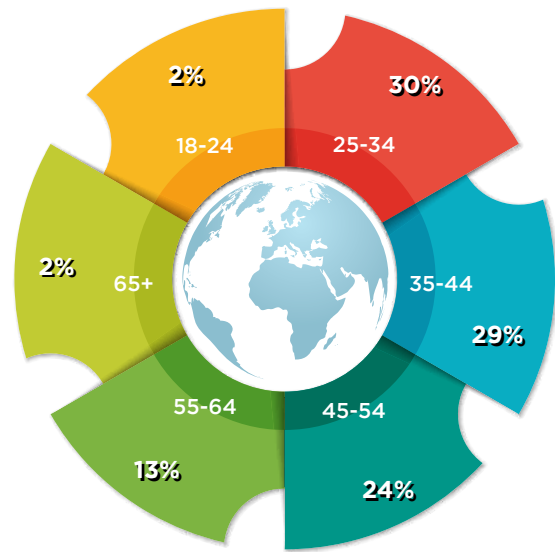
Contract versus Perm (Professionals)



Respondents by sub sector (Professionals)

Utilities	26%
Transmission and Distribution	21%
CCGT	16%
Thermal	13%
Coal	9%
SMART Energy	8%
Hydro	6%

Age (Professionals)



Discipline titles (Professionals)

Electrical Engineer	9%
Project Manager	7%
Mechanical Engineer	5%
Construction Manager	3%
Commissioning Engineer	3%
Civil Engineer	3%
Business Development Manager	3%
Project Engineer	3%
Maintenance Engineer	2%
Administrator	2%
Electrician	2%
Operations Manager	2%
Design Engineer	2%
C&I Engineer	2%
Automation Engineer	2%
Director, Electrical Power	1%
Sales Manager	1%
QA/QC Engineer	1%
HSSE Engineer	1%
Operations and Production Operator	1%

Nationality (Professionals)

Indian	15%
American	12%
British	10%
Pakistani	5%
Egyptian	5%
Canadian	4%
South African	3%
Philippine	3%
Jordanian	6%
Brazilian	2%
Russian	2%
Nigerian	2%
Australian	2%
Indonesian	2%
Romanian	2%
Algerian	2%
Turkish	2%
Greek	1%
Sudanese	1%
Portuguese	1%

3 Skills

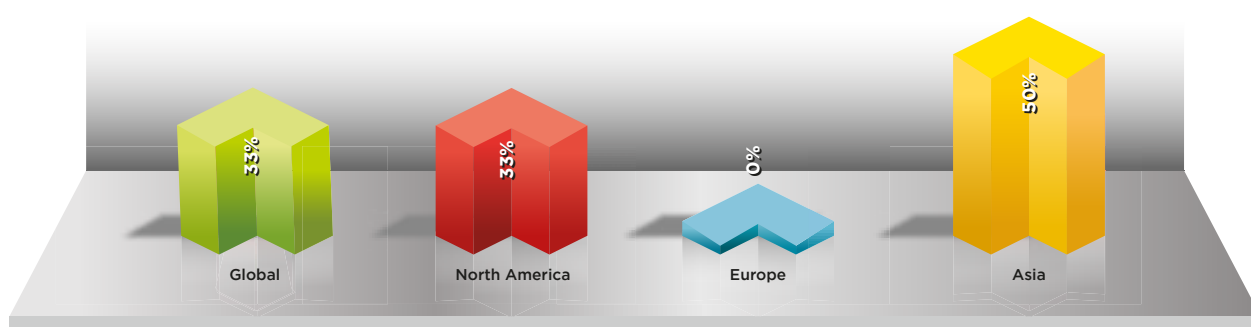
- The overwhelming majority (83%) of hiring managers believe there is a skills shortage in the power sector, compared with 28% in oil and gas, for example.
- Lack of planning for knowledge transfer and skills retention was identified as the biggest cause of skills shortages, cited by more than two thirds of hiring managers.
- Nearly three-quarters (72%) say more training and development is needed to narrow the industry skills gap.
- A similar number of hiring managers believe attracting new, young talent through graduate and apprenticeship schemes is essential.
- More than 40% of power workers 15 years' plus experience in the sector and 15% have more than 25 years' experience.
- But fewer than one in six has been in the sector for less than five years.

"The skills shortage identified in the survey should be a serious concern but the good news is that the industry is aware of the need to attract young workers and train them better. Now the challenge is to turn that awareness into action" said Marx.

"Hiring managers need to acknowledge where the bulk of their skills are held and make an effort now to funnel that knowledge down to the sector's newcomers."

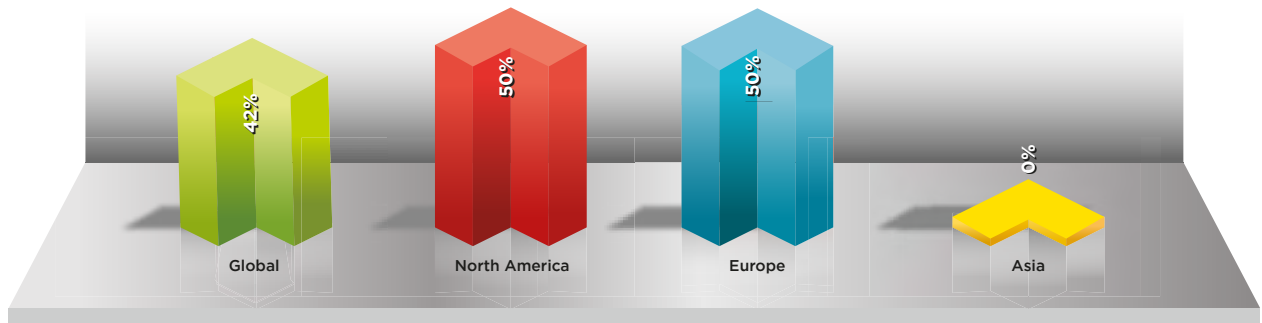
What do you feel are the key causes for skills shortages within your industry? (Hiring Managers)

Loss of manpower due to ageing, retiring workforce



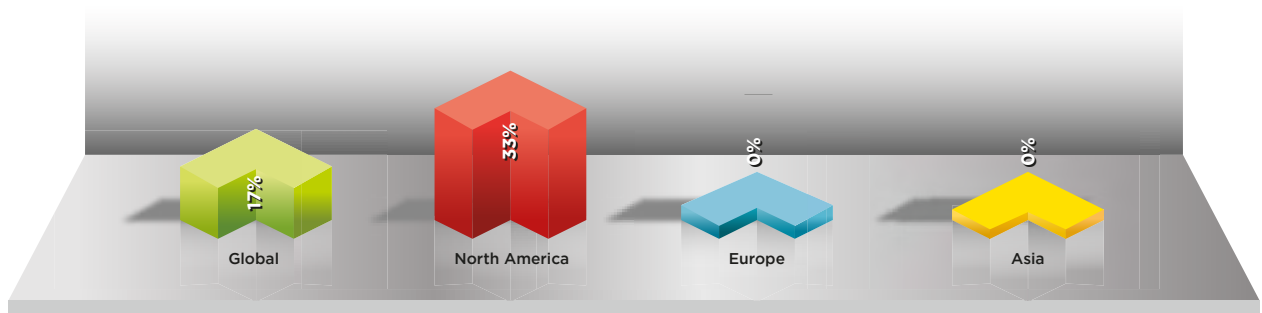
NB respondents could opt for multiple answers

The overall number of professionals entering the industry



NB respondents could opt for multiple answers

Tighter immigration policies restricting access to global talent

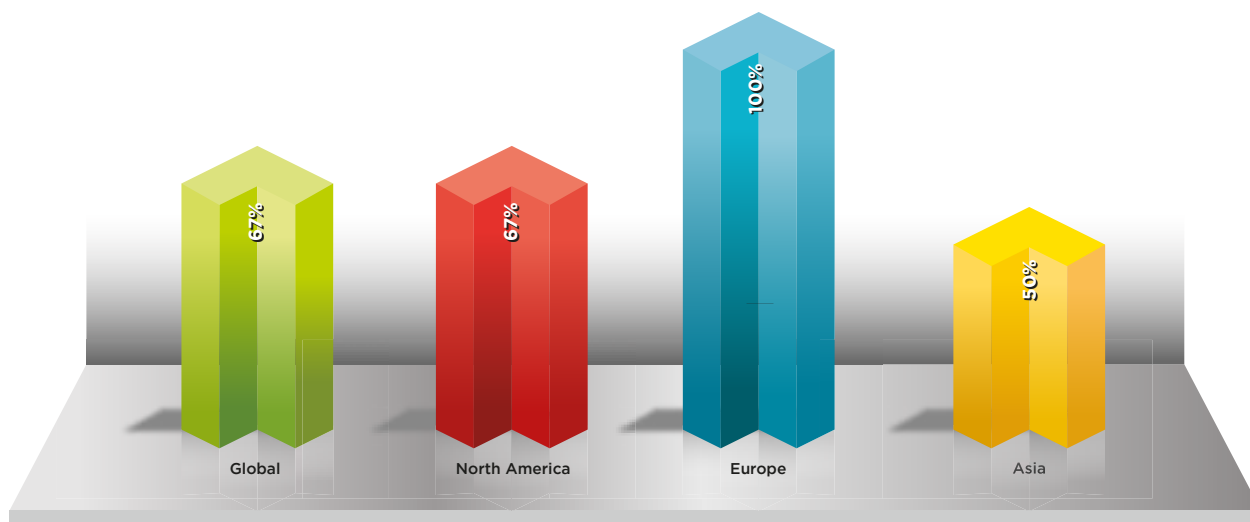


NB respondents could opt for multiple answers



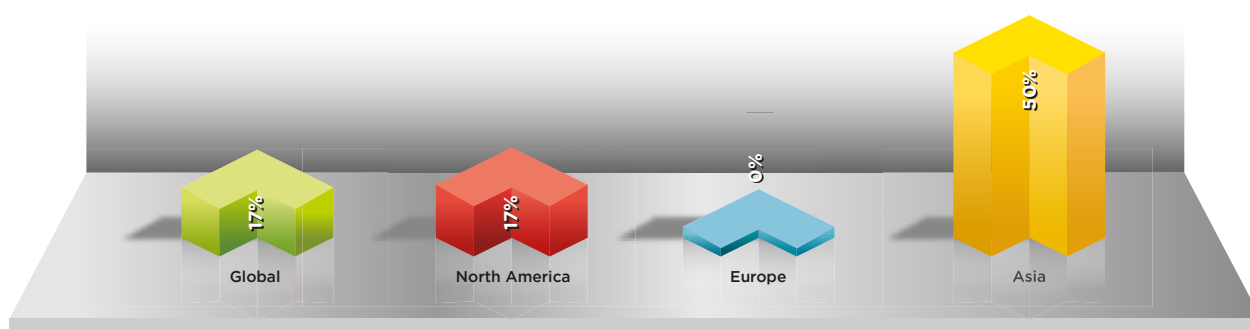
What do you feel are the key causes for skills shortages within your industry? (Hiring Managers) Cont'd

Lack of planning for knowledge transfer/skills retention



NB respondents could opt for multiple answers

I do not believe there is a skills shortage in my industry

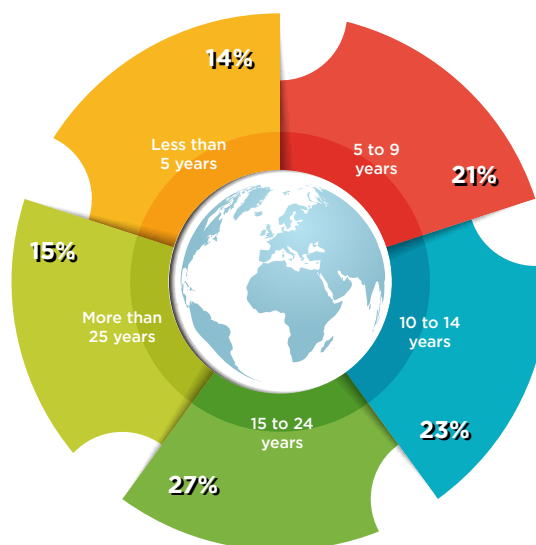


NB respondents could opt for multiple answers

How do you believe employers can overcome the skills gap? (Hiring Managers)



Years of experience (Professionals)





The survey
found nearly two
thirds of power
businesses have
embarked on
a diversification
strategy

4 Hiring

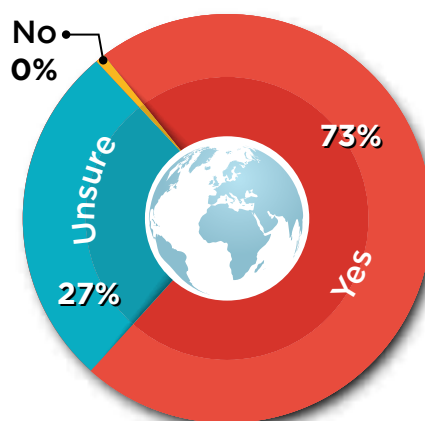
- More than half (55%) of power hiring managers said they were currently hiring.
- Exactly half of hiring managers said they would be hiring between 11 and 20 professionals in the next six months.
- One in six (17%) were optimistic enough to anticipate hiring 51 to 100 people within a year and the same proportion expect to take on more than 100 new staff within 18 months.
- However, just over a third of respondents said they had laid off more than 20% of their workforce in the past year.
- 74% of power professionals are interested in working within other energy sectors; the most popular choice was the oil and gas industry as an alternative career.
- Almost half of professionals (46%) would reduce their salary to move sector.
- Key reasons given by employees for moving sectors were better salaries and packages (65%) and better training and progression opportunities (47%).
- Hiring managers within the power sector may want to consider whether they could target more candidates working in nuclear with 20% of professionals looking to switch to the power sector.

- 73% of hiring managers said they would look to hire from other sectors.

Hannah Peet managing director at Energy Jobline said: *“Employers in North America and Asia made the heaviest staffing cutbacks. The US power sector is being challenged by rising costs associated with infrastructure upgrades, grid modernisation and adjusting to changing sources of generation.”*

“However, the survey’s findings on hiring appetite indicate confidence levels are rising. To ensure the skills shortage isn’t exacerbated hiring managers need to prioritise the retention of industry talent so that vital skills aren’t lost to other energy sectors.”

Would you hire professionals from other energy sectors? (Hiring Managers)

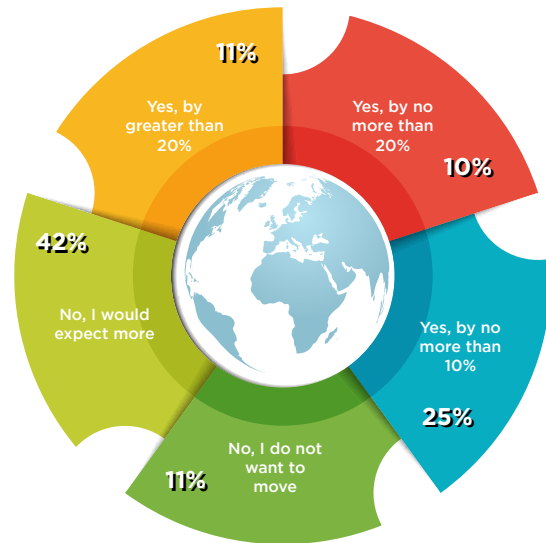


What are the advantages of hiring talent from outside your sector? (Hiring Managers)

	Global
Added skill set	45%
Wider talent pool	72%
Potential cost savings	9%
New way of thinking	64%

NB respondents could opt for multiple answers

Would you reduce your salary to move to another sector? (Professionals)



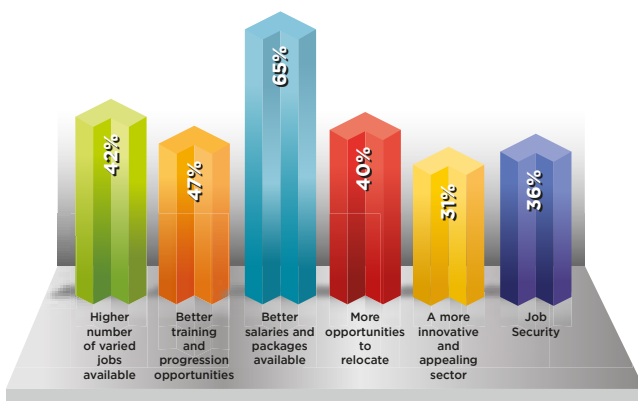
In which alternative energy sector are you most interested in working? (Professionals)

Renewables	21%
Nuclear	16%
Oil & Gas	22%
Petrochemicals	15%

What is your outlook for hiring new talent? (Hiring Managers)

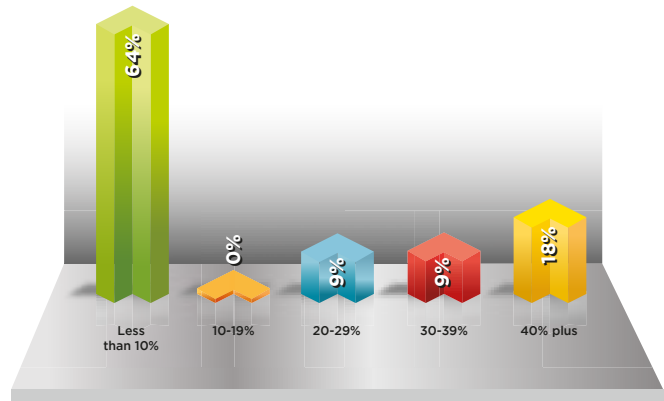
	Less than 10	11-20	21-50	51-100	101+
Next 6 Months	33%	50%	17%	0%	0%
Next 12 Months	33%	17%	33%	17%	0%
Next 18 Months	50%	0%	17%	16%	17%

What would be your reasons for changing sector? (Professionals)



NB respondents could opt for multiple answers

What percentage of your workforce have been laid off in the last 12 months? (Hiring Managers)



5

Salary and Benefits

- Permanent salaries within power are higher than other energy sectors. A HSE Manager in power is paid a global average of \$61,234 compared to renewables at \$57,353 and nuclear at \$57,717.
- More than two thirds of employees expect salaries to increase over the next 12 months; however, only 54% of hiring managers expect an increase.
- In North America, the salary range is higher than in Europe with commercial and business development managers enjoying the best earnings.
- Africa has the lowest average contract rate salary range.

- Power employees value a health plan above all other benefits. It was the preferred benefit for half of respondents globally, putting it well ahead of retirement or pension provision (10%) and bonus or commission (15%).

Marx said: "The survey results continue to indicate that health benefits matter most to employees.

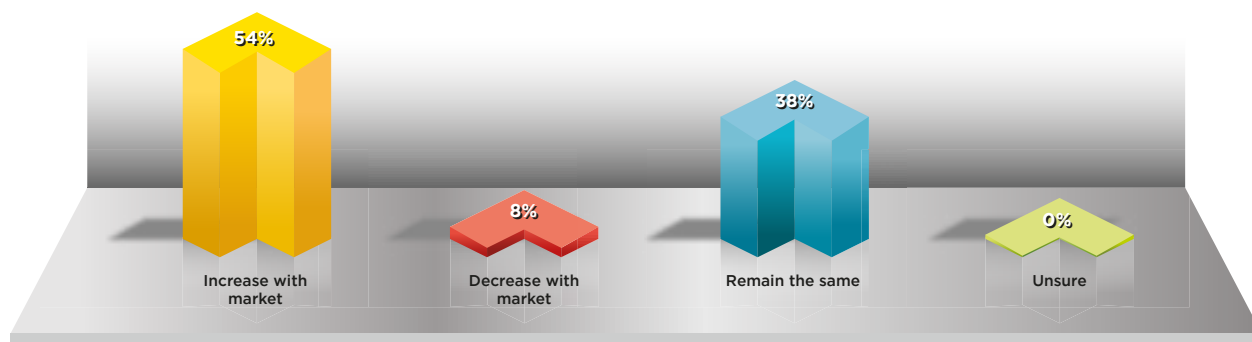
"If employers aren't able to fulfil their workforce's expectations of a pay packet increase, then providing a robust health plan can help supplement what they are able to offer.

"The survey results show that an employee's health and that of his or her family can even outweigh their take home pay in terms of making an employer desirable."

How do you think salaries and remuneration will change over the next 12 months? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Remain the same	21%	14%	11%	27%	26%	30%	20%	26%	25%
Likely to increase	69%	74%	74%	55%	65%	58%	70%	64%	59%
Likely to decrease	2%	1%	1%	9%	0%	5%	2%	2%	0%
Unsure	8%	11%	14%	9%	9%	7%	8%	8%	16%

How do you think salaries and remuneration will change over the next 12 months? (Hiring Managers)



What benefits do you currently receive? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Health Plan	69%	61%	77%	47%	53%	46%	82%	85%	79%
Transport Allowance	54%	55%	69%	30%	37%	34%	76%	32%	55%
Bonuses/Commission	45%	41%	57%	47%	43%	34%	47%	43%	52%
Flights/Leave Allowance	42%	34%	49%	20%	20%	20%	71%	29%	17%
Training	41%	42%	46%	40%	50%	32%	37%	48%	48%
Retirement Plan/Pension	37%	39%	34%	37%	17%	46%	20%	60%	24%
Housing/Relocation	10%	47%	53%	30%	27%	16%	59%	29%	28%
Overtime Pay	31%	32%	27%	7%	20%	27%	39%	37%	14%
I do not receive any benefits	11%	12%	6%	17%	13%	27%	4%	8%	10%
Schooling	12%	7%	14%	0%	7%	2%	17%	17%	21%
Tax Assistance	10%	11%	19%	3%	3%	10%	8%	3%	10%
Hardship Allowance	8%	12%	11%	7%	3%	3%	8%	6%	7%
Share Scheme	5%	4%	6%	10%	0%	12%	3%	5%	3%
Hazardous Pay	8%	15%	9%	0%	10%	3%	6%	8%	0%

NB respondents could opt for multiple answers

What benefit do you value the most? (Professionals)


	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Health plan	50%	46%	49%	12%	32%	32%	54%	64%	65%
Bonus	15%	8%	15%	31%	40%	19%	10%	17%	31%
Retirement	10%	16%	9%	27%	4%	17%	3%	7%	0%
Transport Allowance	2%	3%	4%	0%	0%	2%	2%	1%	0%
Training	5%	3%	5%	0%	0%	8%	4%	1%	0%
Flights/Leave allowance	4%	8%	4%	8%	8%	6%	6%	2%	0%
Housing/Relocation	5%	10%	7%	7%	4%	6%	12%	3%	0%
Hardship Allowance	1%	1%	1%	4%	0%	0%	0%	0%	0%
Overtime Pay	4%	5%	3%	8%	4%	6%	2%	3%	0%
Schooling	2%	0%	2%	0%	0%	1%	5%	0%	4%
Share Scheme	1%	0%	1%	3%	0%	2%	0%	1%	0%
Hazardous Pay	0%	0%	0%	0%	4%	1%	1%	0%	0%
Tax Assistance	1%	0%	0%	0%	4%	0%	1%	1%	0%

Permanent salaries by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Project Engineer	54,284	64,125	65,411	68,574	61,382	72,129
Project Manager	59,328	69,127	67,212	75,323	71,389	77,368
Business Development Manager	62,310	72,175	61,331	77,379	68,829	79,385
CAD Technician/Operator	33,590	39,385	42,398	41,208	40,435	48,579
Chemical Engineer	44,579	57,823	52,184	54,598	61,284	64,389
Civil Engineer	58,579	67,703	66,479	71,479	69,573	73,479
Commercial Manager	67,379	75,579	71,379	78,379	72,479	81,327
Commissioning Engineer	51,294	68,457	64,139	66,386	62,308	72,321
Construction Manager	62,385	70,578	67,378	72,238	73,497	71,329
Control Room Operator	40,409	43,479	42,408	48,678	50,089	54,389
Design Engineer	49,587	52,487	53,451	54,234	57,689	61,485
Electrical Engineer	62,128	70,108	64,385	72,546	66,748	74,475
HSE Manager	54,579	59,786	63,123	66,453	62,375	61,093
Instrumentation Engineer	49,578	66,590	55,673	56,873	64,238	62,341
Inspection Engineer	50,875	65,479	59,767	61,123	68,472	66,176
Maintenance Engineer	52,347	71,097	60,507	73,791	74,579	68,768
Mechanical Engineer	55,799	74,597	64,389	67,457	72,379	71,290
Plant Manager	48,579	57,579	57,596	59,680	66,679	62,394
QA/QC Inspector	63,379	77,689	69,497	71,497	76,579	75,379
Quantity Surveyor	46,379	60,087	60,097	58,439	64,590	62,179

Contract day rates by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Project Engineer	394	418	479	501	461	543
Project Manager	523	618	575	641	630	679
Business Development Manager	456	513	491	535	489	623
CAD Technician/Operator	186	201	219	246	235	212
Chemical Engineer	387	441	410	434	461	476
Civil Engineer	487	512	501	566	514	543
Commercial Manager	476	561	513	546	523	589
Commissioning Engineer	390	463	421	412	439	441
Construction Manager	441	550	456	650	491	589
Control Room Operator	315	347	346	390	333	403
Design Engineer	360	389	391	401	414	404
Electrical Engineer	512	589	501	641	543	623
HSE Manager	411	445	420	521	454	467
Instrumentation Engineer	389	449	412	402	440	430
Inspection Engineer	414	490	429	480	463	494
Maintenance Engineer	451	529	520	655	587	543
Mechanical Engineer	469	551	496	541	503	560
Plant Manager	378	461	412	403	475	440
QA/QC Inspector	505	587	513	612	550	632
Quantity Surveyor	380	429	398	412	401	440



The survey
results show that
an employee's
health and that
of his or her
family can even
outweigh their
take home pay



6

What Attracts Employees

- Hiring managers significantly underestimate the importance of salary banding to power employees, while overestimating the importance of brand.
- Fewer than one in ten hiring managers saw salary banding as the main pull to attract employees to their company. By contrast, almost a third of employees said it was the biggest attraction.
- Hiring managers were also nearly three times as likely as employees to cite brand recognition as the main reason professionals would want to work for their company (36% compared with 14%).
- No hiring managers selected an ethical reputation as the most important attraction, whereas 13% of employees did.
- The importance of salary to power professionals was highlighted again in their motivations for

considering a new role. Base salary (84%) was the most popular driver, with location (66%) second, closely followed by development opportunities (62%) and challenging projects (61%).

Peet said: *"According to our results, brand is not the recruitment draw hiring managers hope it should be. Instead, the results suggest they need to re-examine their compensation packages looking at both pay structures and benefits."*

"Employees want clarity. They want to know exactly where they stand and what they need to do to get to the next level."

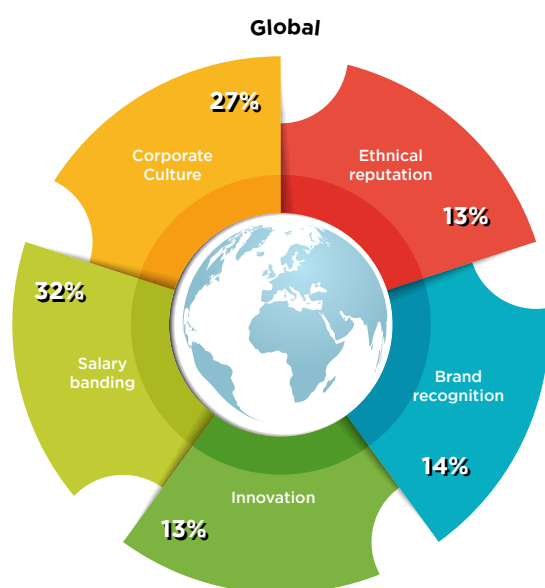
"Employers also need to consider their ethical reputation. As climate change features more heavily in the mainstream media, people have become more aware and attentive to the environment around them. Employers need to acknowledge and reflect that awareness."

Which factors do you consider when looking for a new role? (Professionals)

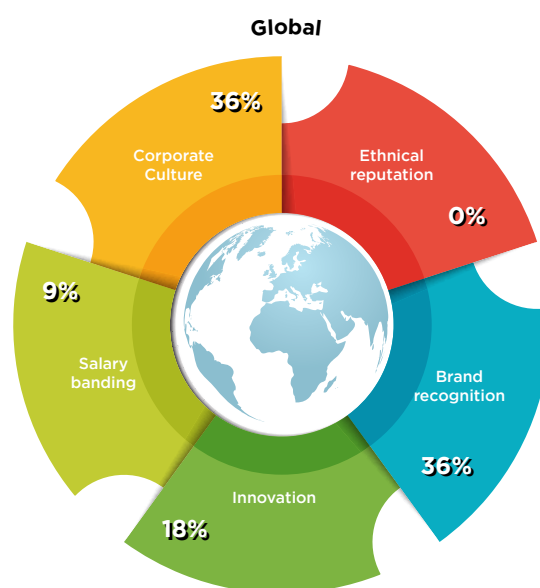
	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Base Salary	84%	76%	84%	93%	85%	83%	86%	89%	69%
Location	66%	54%	62%	64%	70%	69%	68%	74%	55%
Professional Development	62%	68%	62%	68%	56%	55%	65%	52%	72%
Challenging projects	61%	63%	62%	68%	44%	61%	62%	51%	62%
Bonus/commission structure	50%	42%	55%	57%	56%	33%	54%	56%	59%
Home/leave allowance	41%	38%	51%	32%	30%	25%	56%	37%	17%
Relocation/housing package	39%	38%	44%	53%	52%	22%	42%	40%	21%
Retirement plan	33%	38%	38%	21%	22%	32%	26%	46%	21%
International schooling	24%	30%	26%	14%	37%	10%	32%	11%	31%
Tax assistance	15%	16%	27%	18%	19%	12%	12%	9%	7%
Hardship allowance	14%	14%	22%	11%	11%	8%	16%	11%	3%
Share scheme	10%	11%	14%	14%	0%	9%	6%	12%	10%
other	4%	4%	6%	3%	0%	4%	4%	4%	3%

NB respondents could opt for multiple answers

What do you believe attracts more employees to a company? (Professionals)



What do you believe attracts more employees to your company? (Hiring Managers)



7

Global Mobility – contracting and career progression

- The survey found nearly two thirds of power businesses have embarked on a diversification strategy, in new regions or fields, outside their core business in the past year.
- Almost half of hiring managers (46%) indicated that diversification could be on the agenda in the next 12 months with the same number saying they were unsure whether or not it would be.
- Expat workforce levels are especially low in North America (7%) and highest in the Middle East (85%), which offers many opportunities for skilled workers and low rates of tax. Expats account for between 15% and 26% of power professionals in all other regions.
- Power industry hiring managers actually selected North America as one of three global hot spots, alongside two regions experiencing population booms and industrialisation: Asia and the Middle East.

- However, candidates indicated Europe (28%) was their preferred region to work in.
- 36% of power professionals are in contract roles, with 55% of contracts due to expire in the next 6 months.

Peter Searle, Airswift CEO said: “Diversification has taken centre stage in the energy arena recently.

“As global volatility raged, companies have worked to diversify their portfolio, minimizing their risk.

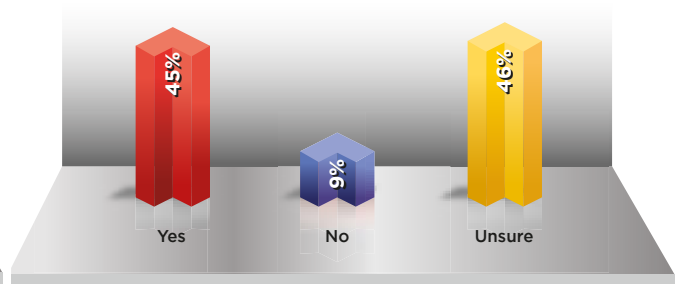
“The survey results indicate the power sector is looking to create a more robust offering.

“Asia’s status as a hot spot would appear especially secure, given that power consumption in both China and India is set for substantial annual increases over the next two decades. Hiring managers need to communicate that opportunity now.”

Has your company embarked on a diversification strategy in regions or other fields outside of your core business in the last 12 months? (Hiring Managers)



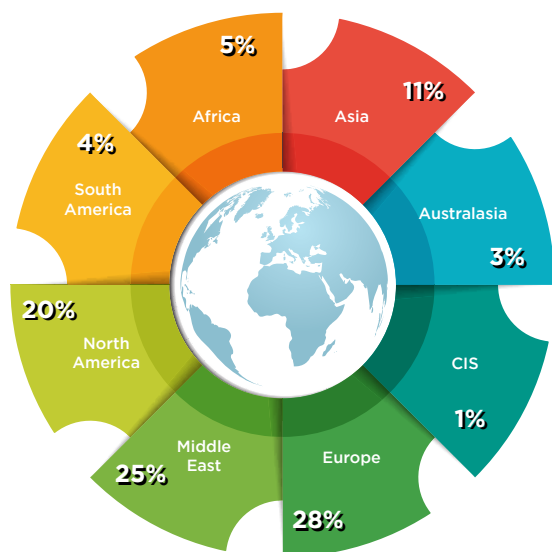
Would your company embark on a diversification strategy in regions or other fields outside of your core business in the next 12 months? (Hiring Managers)



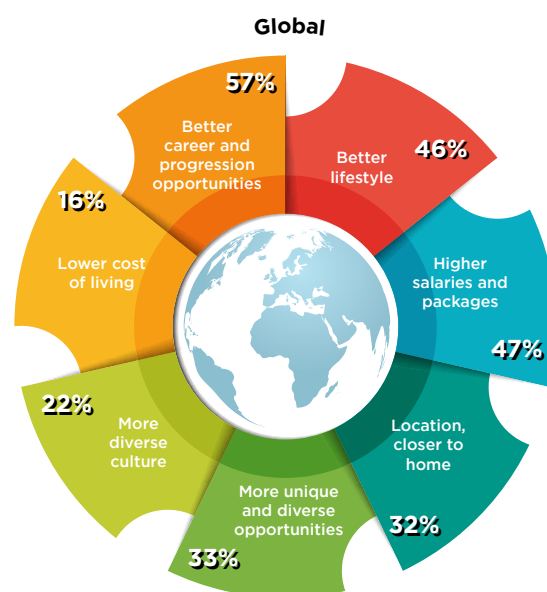
Local versus Expat

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Expat	29%	21%	16%	25%	15%	26%	85%	7%	23%
Local	71%	79%	84%	75%	85%	74%	15%	93%	77%

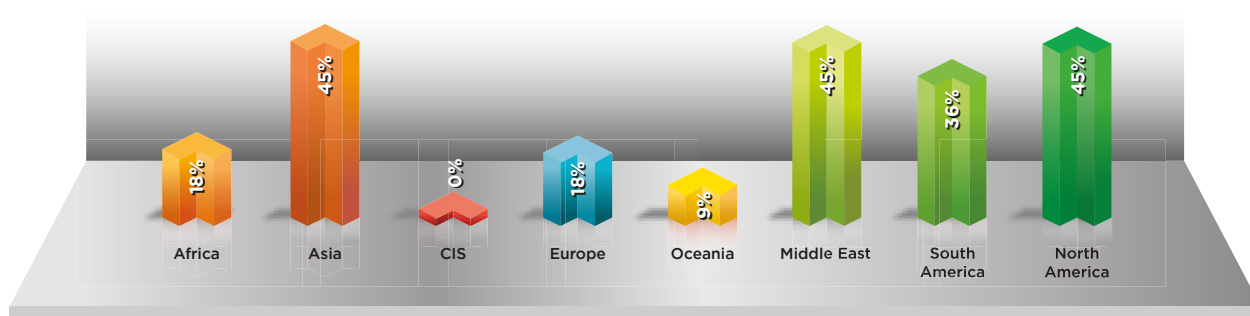
Which is your preferred region of work? (Professionals)



What are your reasons for wanting to work in your preferred region? (Professionals)



Which regions do you feel are potential hot spots across the energy industry? (Hiring Managers)



NB respondents could opt for multiple answers

When is your contract due to expire? (Professionals)





8

Final Thoughts


Marx commented: *“The power sector is undergoing profound changes that will create winners and losers over the years ahead. As identified in the International Energy Agency’s 2016 World Energy Outlook, demand response and energy storage will become vital to smooth operations once wind and solar account for a quarter of the power mix.*

“Power companies need to constantly assess their position in the wider industry and take decisions about how they can either adjust to or help shape the sector’s evolution.

“This research should help hiring managers better understand the key factors that

influence professionals in deciding who they want to work for, as well as which sectors and locations might tempt them to move. An urgent need for better training, a vast gender gap and a relatively poor outlook for salaries in Europe are among the issues highlighted in this year’s data – and it will be instructive to see how much they change next year.”

Searle added: *“This report reveals a mixed picture for power globally, with much to be positive about and much that could be improved. We hope the findings will encourage companies to actively address key challenges, from attracting more talent into the sector to focusing on the value of an ethical reputation.”*



An urgent need
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GETI

Global Energy Talent Index



The Global
Energy Talent
Index Report

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Renewables

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Executive Summary

Renewable energy generation is growing rapidly across the world, driven by factors including greater cost competitiveness, improved financing and concerns about both energy security and carbon emissions. More than 8.1 million people are employed in renewables worldwide, a 5% annual increase. But despite this global boom, important questions about the industry's future direction remain, including what matters to employees and where the sector goes next? Unique research carried out by Airswift and Energy Jobline highlights many of the key challenges facing the industry and seeks to outline potential solutions. **The Global Energy Talent Index (GETI)** survey reveals:

- Major concern about skills training and knowledge transfer within renewables.
- Worrying weakness in the anticipated volume of recruitment.
- Renewables professionals are more concerned with salary and less with brand than what hiring managers believe.
- Corporate culture is a major factor in company attractiveness.
- Strong interest in recruiting from other industries to expand thinking.

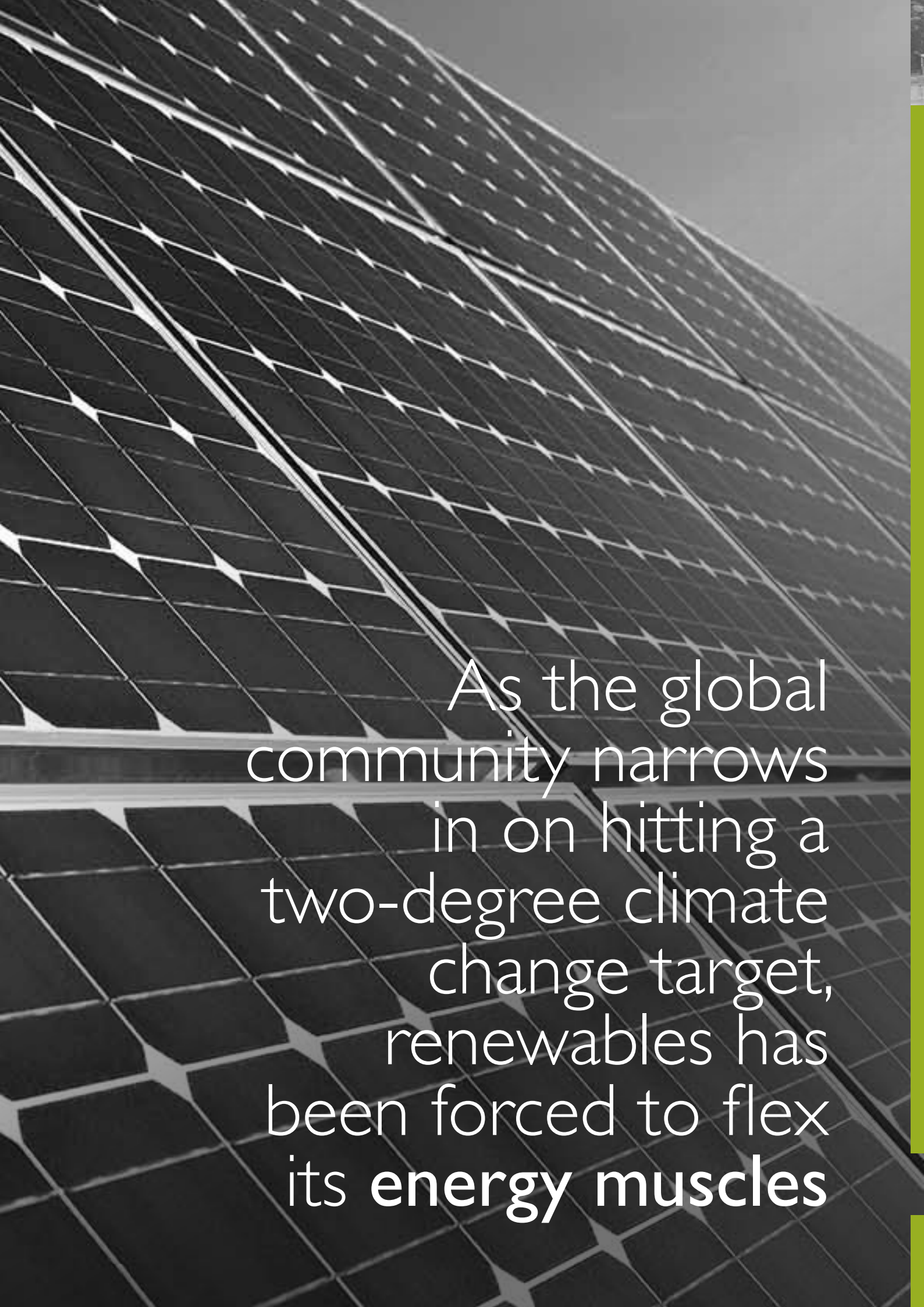
Energy Jobline managing director Hannah Peet said:

“Renewables has taken centre stage in recent years.

As the global community narrows in on hitting a two-degree climate change target, renewables has been forced to flex its energy muscles.

“The International Energy Agency has stated that renewables is no longer a romantic idea and we agree. However, it's not without its challenges. A new Trump administration, for example, has staked its claim on more traditional energy sources, including coal.

“And our research reveals employers and employees are not on the same page when it comes to what matters to them at work. Once the sector rights that, it can confidently address its other challenges to market and most importantly help the global community achieve its two degree goal.”



As the global
community narrows
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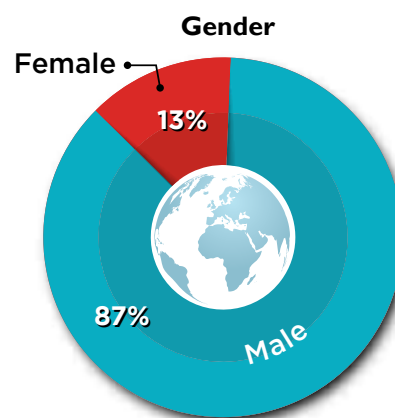
2

Survey Demographics

- The renewables workforce is slightly younger than oil and gas or nuclear, but regional maturity of the sector is a factor in the demographics. The most represented age group in the survey was 35 to 44 year olds (31%), closely followed by 25 to 34 (29%). Just over two fifths of the sample were aged 45 or above.
- More women can be found in senior positions (13%) than in other energy industries. Eight per cent of women respondents were at VP/Director level (compared to just 2% of women in oil and gas) and 45% were in senior/managerial roles (versus 36% in oil and gas).

Janette Marx, COO of Airswift, said: “Renewables has a younger workforce compared to other energy sectors, which means it has the opportunity to avoid the mass exodus of retiring talent, taking their knowledge and skills with them, that industries like oil and gas have endured.

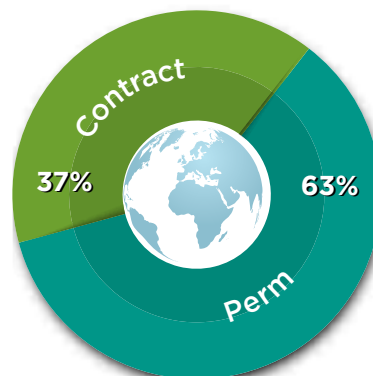
“But it needs to put those practices in place now, by ensuring it has the right mentoring and coaching to encourage skills to trickle down. While the gender demographic is more favourable, there is still work to be done to attract more women into the sector.”



What is your employment level? (Professionals)

	Global	Female	Male
Graduate	11%	13%	10%
Intermediate	30%	34%	30%
Senior Manager	47%	45%	48%
Vice President / Director	12%	8%	12%

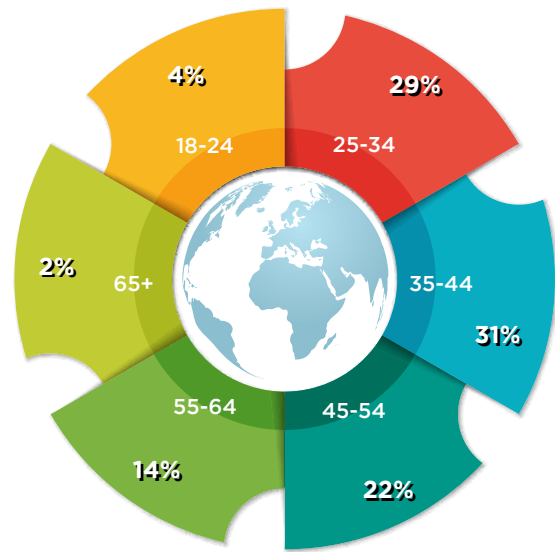
Contract versus Perm (Professionals)



Respondents by sub sector (Professionals)

Solar	33%
Wind	25%
Environmental	11%
Sustainability	10%
Biomass	5%
Hydro	4%
Waste/Recycling	4%
Energy from waste	4%
Anaerobic Digestion	2%
Marine	2%

Age (Professionals)



Discipline titles (Professionals)

Business Development Manager	6%
Project manager	6%
Account manager	4%
Consultant	4%
Wind turbine technician	3%
Civil engineer	3%
Operations manager	2%
Construction manager	2%
Consultant	2%
Project engineer	2%
Electrical engineer	2%
Design engineer	2%
QA/QC Manager	2%
Supervisor	1%
Commercial manager	1%
Advisor	1%
Application engineer	1%
Architect	1%
Mechanical engineer	1%
Project coordinator	1%

Nationality (Professionals)

American	17%
British	15%
Indian	9%
Canadian	4%
Egyptian	3%
Italian	3%
South African	3%
Brazilian	3%
Pakistani	2%
Romanian	2%
Greek	2%
Nigerian	2%
Spanish	2%
German	2%
Portuguese	2%
Australian	2%
French	1%
Philippine	1%
Jordanian	1%
Mexican	1%

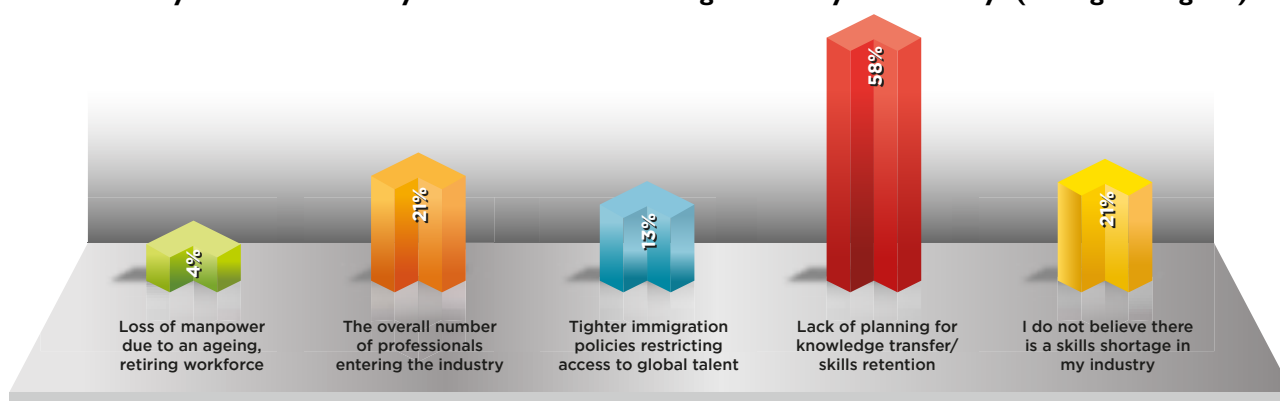
3 Skills

- Four out of five hiring managers believe there is a skills shortage in the sector compared to just under a third in oil and gas.
- Majority blame lack of planning for skills shortage.
- More than a quarter of North American hiring managers said tighter immigration policies are restricting access to global talent.
- Just over one fifth of managers see the overall number of professionals entering the industry as a cause of skills shortages.

Marx added: “Essentially these results show us this is crunch time for the renewables sector. The overwhelming majority believe there is a skills shortage and that a lack of planning is to blame.

“Instead of being alarmed by these figures, hiring managers should see them as an opportunity. They’ve recognised this early and while they still have a relatively young workforce. But they need to move fast. If they’re able to put the right practices in place now they can swerve some completely avoidable pain in the long-run.”

What do you feel are the key causes for skills shortages within your industry? (Hiring Managers)



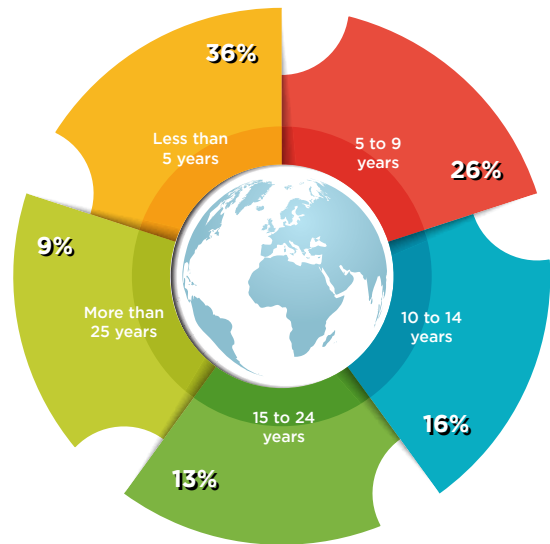
NB respondents could opt for multiple answers

How do you believe employers can overcome the skills gap? (Hiring Managers)



NB respondents could opt for multiple answers

Years of experience (Professionals)





4 Hiring

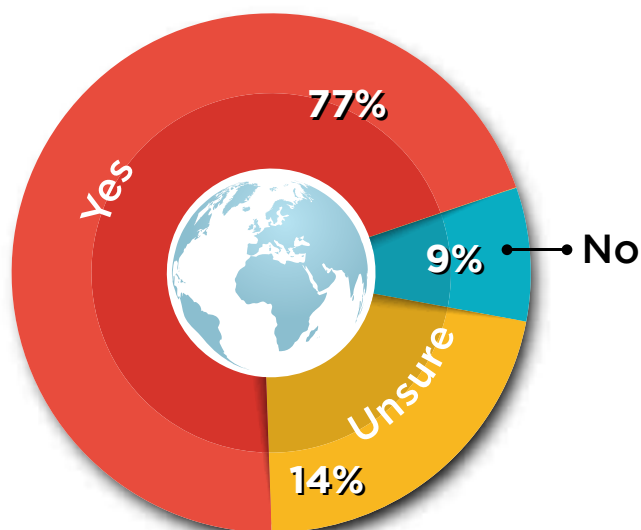
- Almost half of renewables employers said they were not currently hiring.
- Nearly three-quarters of renewables firms plan to hire fewer than 10 staff in the next six months and 60% expect to hire fewer than 10 in the next year.
- 18% of renewables employers let more than 10% of their workforce go in the last 12 months.
- More than three-quarters of hiring managers believe recruiting from other energy disciplines would be “very beneficial.” The main reason given was a ‘new way of thinking’.
- Oil and gas professionals view renewables as the most interesting sectors to move into.

Nearly two thirds of renewable professionals are interested in working within alternative energy sectors and 45% would reduce their salary in order to make the move.

Peet commented: “The global downturn in oil and gas resulted in hundreds of thousands of people losing their jobs. The survey results show there is an appetite from the sector to transfer their skills. Renewables firms need to capitalise on that and the first step may be letting go of any preconceived notions that the transferable workforce will flee at the first sign of oil price recovery.

“In our interactions, former oil and gas employees are looking for a less volatile industry and are tired of riding the oil price rollercoaster.”

Would you hire professionals from other energy sectors? (Hiring Managers)

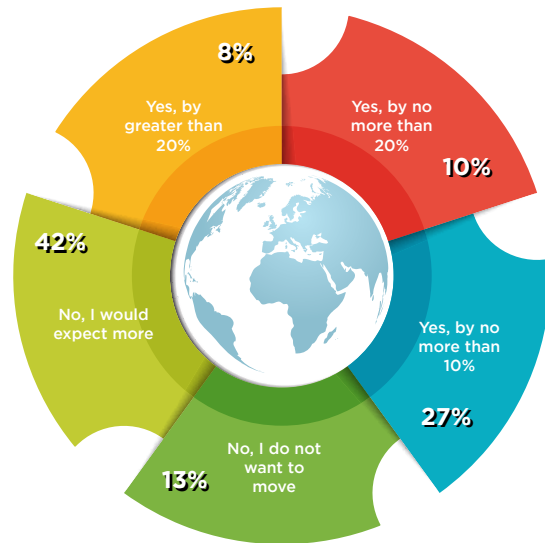


What are the advantages of hiring talent from outside your sector? (Hiring Managers)

	Global
Added skill set	55%
Wider talent pool	64%
Potential cost savings	9%
New way of thinking	77%

NB respondents could opt for multiple answers

Would you reduce your salary to move to another sector? (Professionals)



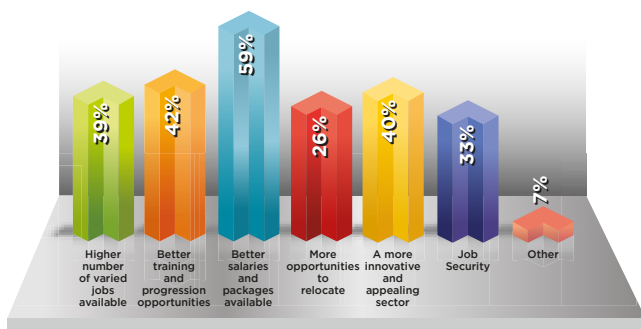
In which alternative energy sector are you most interested in working? (Professionals)

Oil & Gas	18%
Nuclear	13%
Power	20%
Chemicals	13%

What is your outlook for hiring new talent? (Hiring Managers)

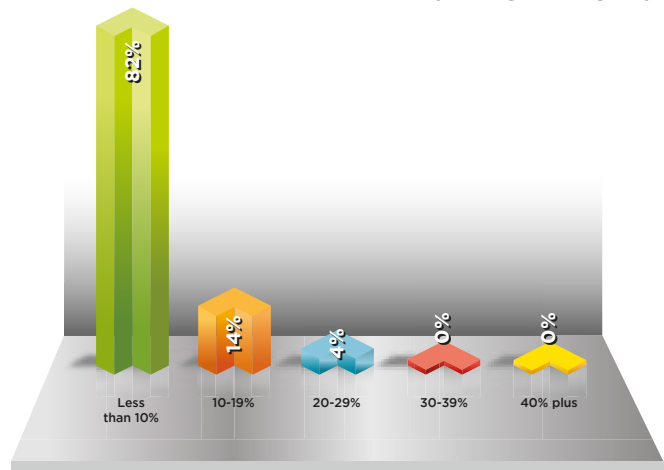
	Less than 10	11-20	21-50	51-100	101+
Next 6 Months	73%	9%	18%	0%	0%
Next 12 Months	60%	10%	10%	10%	10%
Next 18 Months	44%	22%	0%	11%	23%

What are your reasons for changing sector? (Professionals)



NB respondents could opt for multiple answers

What percentage of your workforce have been laid off in the last 12 months? (Hiring Managers)



5

Salary and Benefits

- Two thirds of renewables employees expect salaries to increase in the next 12 months.
- Workers in Africa (80%), Asia (82%), the Middle East (73%) and North America (67%) are all optimistic about their pay prospects.
- Those in Europe (51%) are less certain.
- A health plan (49%) is the most valued benefit among professionals, comfortably trumping bonus or commission packages (18%).
- Inclusive healthcare is the most important benefit for nearly three-quarters of renewables workers in North America (68%), whereas the figure is a third in Europe – only slightly ahead of a bonus or pension.

- 14% of renewables employees are not receiving any benefits.

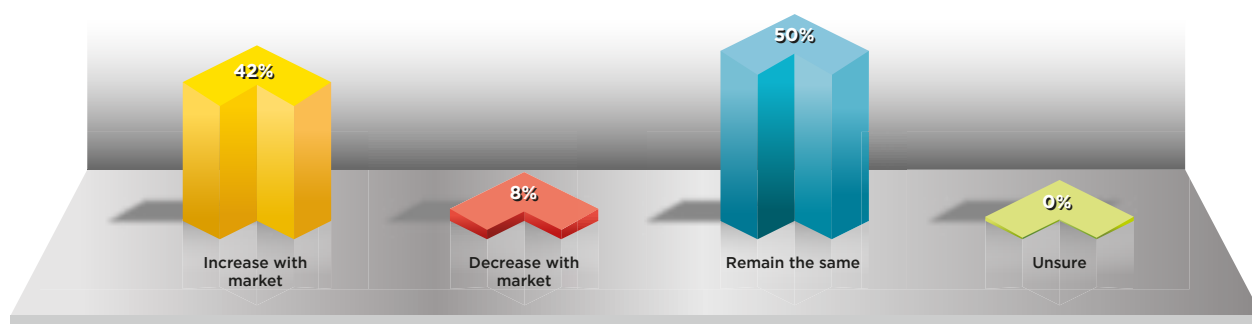
Marx said: “While renewables might struggle to compete on a salary front, it can gain the competitive edge with its benefits.

“And our research shows that’s at the heart of what matters most to employees. Their ability to take care of their own and their families’ health outweighs their bonus. This is a real opportunity for renewables to carve out a USP as caring employers in the marketplace.”

How do you think salaries and remuneration will change over the next 12 months? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Salaries are likely to increase	65%	80%	84%	57%	60%	51%	73%	67%	60%
Salaries will stay the same	22%	10%	11%	29%	40%	31%	19%	20%	33%
Salaries are likely to decrease	6%	3%	1%	7%	0%	9%	5%	6%	4%
I am unsure	7%	7%	4%	7%	0%	10%	2%	7%	2%

How do you think salaries and remuneration will change over the next 12 months? (Hiring Managers)



What benefits do you currently receive? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Health plan	60%	56%	64%	43%	20%	42%	74%	77%	79%
Transport allowance	46%	54%	67%	29%	20%	40%	72%	31%	55%
Training	44%	46%	40%	36%	0%	41%	29%	50%	55%
Bonuses/Commission	43%	39%	50%	43%	40%	38%	46%	48%	47%
Retirement Plan/Pension	38%	43%	30%	14%	20%	40%	17%	47%	40%
Flights/Leave Allowance	30%	36%	40%	21%	20%	18%	68%	25%	34%
Housing/Relocation	24%	27%	33%	21%	20%	18%	45%	15%	40%
Overtime Pay	23%	25%	18%	21%	20%	19%	33%	29%	19%
I do not receive any benefits	14%	11%	10%	29%	20%	22%	5%	11%	6%
Schooling	9%	4%	2%	14%	0%	3%	19%	14%	30%
Share Scheme	6%	4%	5%	14%	0%	9%	0%	4%	4%
Tax Assistance	5%	8%	11%	7%	0%	4%	4%	1%	11%
Hardship Allowance	3%	5%	4%	0%	0%	3%	4%	2%	0%
Hazardous Pay	3%	5%	2%	0%	0%	2%	4%	2%	9%

NB respondents could opt for multiple answers

What benefit do you value the most? (Professionals)

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Health plan	49%	56%	45%	20%	25%	33%	51%	68%	55%
Bonus	18%	8%	16%	30%	50%	25%	15%	15%	20%
Retirement	11%	13%	16%	10%	0%	15%	6%	6%	9%
Transport Allowance	2%	2%	3%	0%	0%	4%	0%	0%	0%
Flights/ Leave Allowance	3%	1%	3%	0%	25%	2%	7%	1%	0%
Training	8%	3%	7%	10%	0%	10%	7%	3%	9%
Housing/Relocation	4%	3%	5%	20%	0%	3%	13%	1%	4%
Hardship Allowance	0%	0%	1%	10%	0%	0%	2%	0%	1%
Overtime Pay	3%	1%	1%	0%	0%	5%	1%	3%	0%
Schooling	1%	1%	1%	0%	0%	1%	1%	3%	2%
Share Scheme	1%	0%	2%	0%	0%	2%	0%	0%	0%
Hazardous Pay	0%	0%	0%	0%	0%	0%	1%	0%	0%
Tax Assistance	0%	0%	1%	0%	0%	0%	1%	0%	0%

Permanent salaries by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Construction Manager	39,180	44,365	44,446	49,520	42,286	54,810
Electrical Engineer	36,656	40,656	43,345	44,650	41,180	52,560
Project Manager	40,110	42,228	43,876	46,045	44,560	52,010
Maintenance Engineer	48,890	54,630	42,320	46,655	35,376	63,131
Civil/Structural Engineer	39,468	42,181	43,811	44,410	44,110	47,890
Business Development Manager	48,865	54,480	44,885	55,110	42,228	61,130
Mechanical Engineer	37,550	41,880	41,120	43,260	40,660	49,090
Wind Turbine Technician	33,387	35,568	37,555	38,645	36,810	41,130
Marine Engineer	36,678	40,130	40,880	42,250	40,230	45,660
Solar Engineer	33,231	37,700	37,800	39,650	36,500	46,670
Operations Manager	35,545	38,680	41,130	40,277	36,760	51,610
Project Engineer	34,490	36,656	39,974	38,885	40,060	43,330
Design Engineer	38,110	41,130	42,210	40,110	40,110	45,540
QA/QC Manager	41,120	44,345	43,890	48,375	45,500	52,210
Commercial Manager	42,118	47,652	43,386	54,450	44,480	59,600
HSE Manager	52,348	58,876	65,712	45,427	69,675	52,080
Biomass Engineer	30,820	33,760	30,330	38,115	31,568	35,033
Energy Engineer	33,075	39,324	38,222	42,934	35,035	48,290
Renewable Energy Consultant	31,762	34,870	35,350	38,559	33,145	46,956
Wind Farm Project Manager	44,576	49,743	61,293	45,640	54,176	50,816

Contract day rates by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Construction Manager	264	458	212	408	363	278
Electrical Engineer	212	302	218	445	290	249
Project Manager	389	472	363	428	423	414
Maintenance Engineer	332	461	390	525	319	479
Civil/Structural Engineer	312	364	330	411	387	428
Business Development Manager	478	489	401	573	360	522
Mechanical Engineer	412	417	410	608	323	526
Wind Turbine Technician	314	402	319	381	289	390
Marine Engineer	298	361	378	444	383	397
Solar Engineer	301	467	363	390	441	482
Operations Manager	367	412	389	490	443	469
Project Engineer	412	461	432	545	480	519
Design Engineer	287	392	341	363	412	384
QA/QC Manager	413	461	391	580	480	533
Commercial Manager	433	541	444	630	487	610
HSE Manager	412	501	420	554	418	496
Biomass Engineer	191	187	143	251	141	236
Energy Engineer	216	303	274	298	221	268
Renewable Energy Consultant	278	314	312	353	334	363
Wind Farm Project Manager	465	414	403	509	387	485

A black and white photograph of a wind farm at sunset or sunrise. Several wind turbines are visible, with the closest one in the foreground and others receding into the distance. The sky is filled with dramatic, layered clouds. In the background, a body of water reflects the lights from a distant shoreline, which appears to have some industrial or urban structures. The overall mood is serene yet powerful.

Being part of
a progressive,
environmentally
friendly industry
sector is clearly
important but it
isn't the employer
brands that matter

6

What Attracts Employees

- GETI highlights disparities between employers' and employees' perceptions of what matters most.
- Professionals were more than twice as likely as those doing the hiring to answer salary banding (29% versus 14%) but hiring managers were more than twice as likely to cite brand recognition (13% versus 27%).
- Corporate culture is the second biggest consideration for employees (28%).

Marx added: "The research shatters the hiring managers' assumption that people are motivated by the brand.

"What the research tells us is employees care less about the brand they work for than they do about how they feel when they're at work and also how much they get paid to be there.

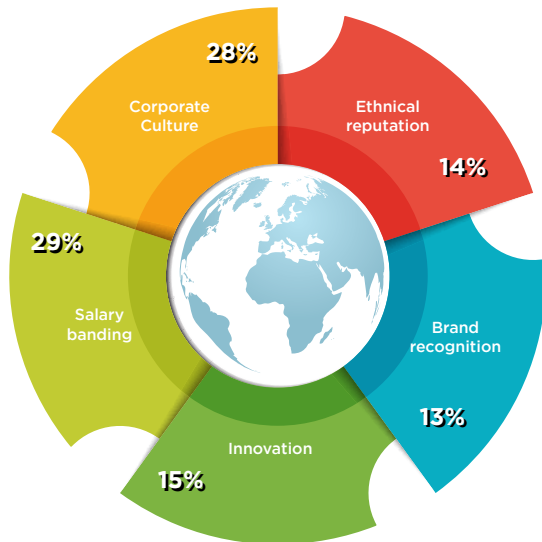
"Hiring managers cannot rely on the power of their brand to garner loyalty or retention. And if they can't afford to keep upping salaries, they need to be focusing on their culture. Whether that's flexible working or a creative working environment, if they're able to nail that right, they have a greater chance of retaining top talent."

Which factors do you consider when looking for a new role? (Professionals)

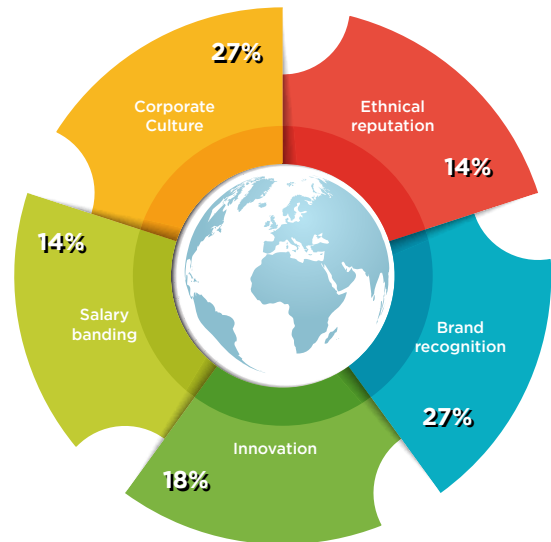
	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Base Salary	81%	75%	85%	79%	80%	80%	74%	85%	85%
Location	68%	53%	59%	79%	40%	71%	62%	76%	66%
Professional Development	66%	73%	71%	64%	60%	59%	68%	66%	79%
Challenging projects	64%	65%	68%	71%	80%	66%	59%	60%	62%
Bonus/commission structure	49%	51%	54%	50%	40%	41%	47%	59%	45%
Home/leave allowance	34%	38%	33%	7%	20%	26%	32%	47%	36%
Relocation/housing package	32%	41%	38%	14%	20%	25%	37%	34%	15%
Retirement plan	28%	32%	38%	14%	20%	23%	42%	27%	30%
International schooling	18%	23%	27%	7%	20%	14%	25%	10%	36%
Tax assistance	11%	12%	20%	7%	20%	9%	20%	9%	4%
Hardship allowance	10%	10%	14%	7%	40%	10%	8%	10%	4%
Share scheme	9%	14%	14%	7%	0%	6%	15%	7%	2%
other	5%	6%	4%	7%	0%	6%	1%	6%	0%

NB respondents could opt for multiple answers

What do you believe attracts more employees to a company? (Professionals)



What do you believe attracts more employees to your company? (Hiring Managers)



7

Global Mobility – contracting and career progression

- GETI found nearly two thirds of renewable businesses have embarked on a diversification strategy outside their core business, in new regions or fields, in the past year.
- The Middle East has by far the highest proportion of expat workers (78%).
- North America has the lowest proportion of expat workers – less than one in ten compared to around a third in Europe.
- The majority of hiring managers see Asia as the main hot spot region for growth.
- However, candidates expressed most interest in working in Europe (40%) and North America (25%).
- Workers in the developing regions of Asia (72%), Africa (67%) and the Middle East (66%) were far more motivated by the chance to progress their careers than those in the West.
- Europeans were more concerned with a better lifestyle (44%) than with advancing their career (34%).
- Salary ranked third globally but failed to make the top three for Europeans and North Americans.
- 42% of renewables professionals applied for jobs outside their home country in 2016.
- 37% of renewable professionals are in contract roles, with 72% of contracts due to expire in the next 12 months.

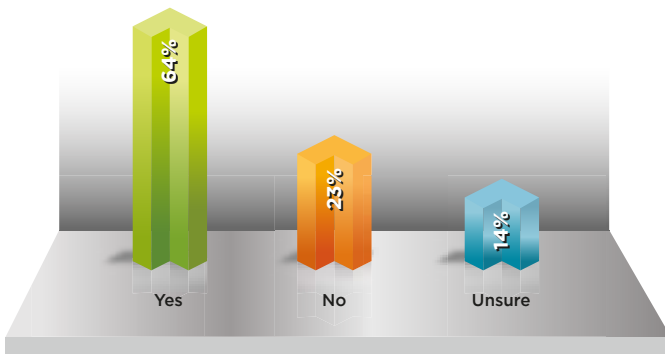
Peet noted: “We think the Middle East will continue to be a place of opportunity for renewables expats. Oil-rich Saudi Arabia is targeting 9.5 GW of renewable energy by 2023 in line with Vision 2030 – its plan is to diversify its economy away from oil and gas. Its renewables programme includes between \$30billion and \$50billion of investment in that period.

“The research shows a discord between where employers and employees see the expat opportunities. If hiring managers see Central Asia as leading the race then our research suggests they need to sell the workforce on the type of lifestyle and career progression they can have there.”

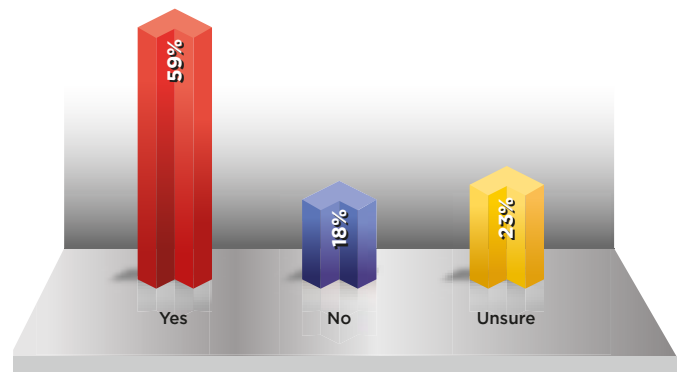
Local versus Expat

	Global	Africa	Asia	Australasia	CIS	Europe	Middle East	North America	South America
Expat	34%	19%	11%	12%	22%	33%	78%	9%	19%
Local	66%	81%	89%	88%	38%	67%	22%	91%	81%

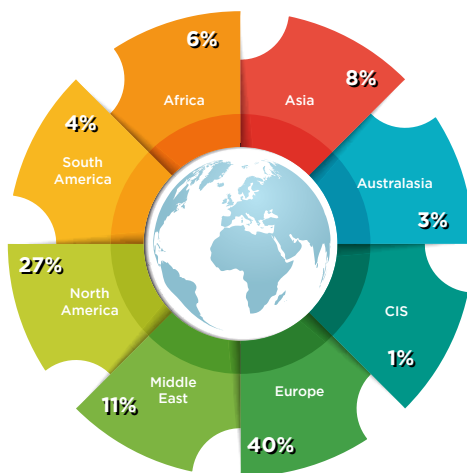
Has your company embarked on a diversification strategy in regions or other fields outside of your core business in the last 12 months? (Hiring Managers)



Would your company embark on a diversification strategy in regions or other fields outside of your core business in the next 12 months? (Hiring Managers)



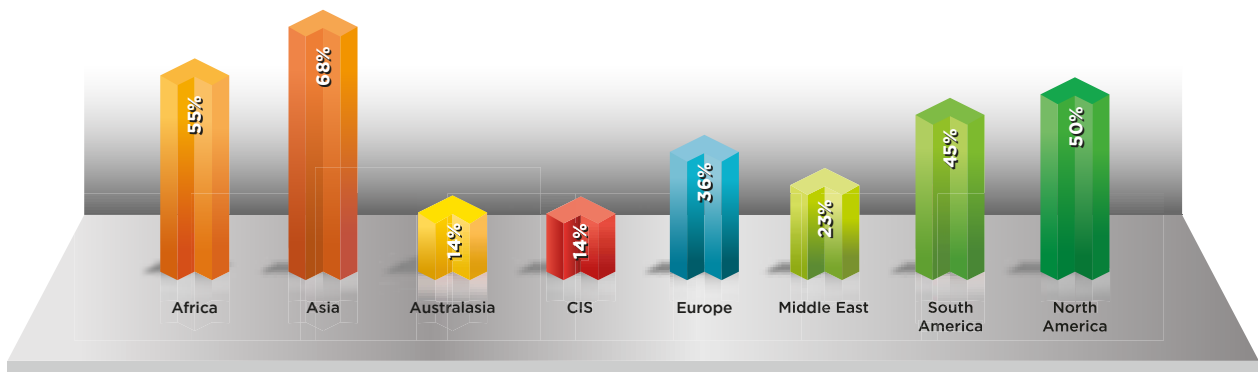
Which is your preferred region of work? (Professionals)



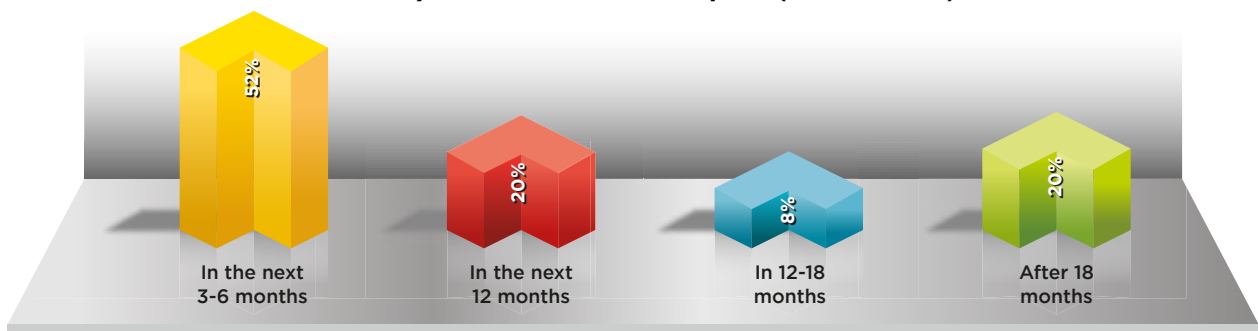
What are your reasons for wanting to work in your preferred region? (Professionals)



Which regions do you feel are potential hot spots across the energy industry? (Hiring Managers)



When is your contract due to expire? (Professionals)



A photograph of several wind turbines in a field, with their reflections visible in the water in the foreground. The sky is overcast.

8

Final Thoughts

Marx said: *“The GETI survey provides a foundation for the renewables industry to work from. Renewables is an exciting employment market, which is growing at five per cent per annum in terms of head count.*

“People who work in renewables are unlikely to want to change to another energy sector such as oil and gas and employers are keen to bring in new talent from elsewhere, talent which is likely to then stay in the industry.

“Being part of a progressive, environmentally friendly industry sector is clearly important but it isn’t the employer brands that matter when it comes to making a specific company attractive, it is more traditional motivators, specifically salary, progression and benefits packages, with health care being of particular value.”



Renewables
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employment
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GETI
Global Energy Talent Index



energyjobline

The Global
Energy Talent
Index Report **2017**

Nuclear

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I Executive Summary

The nuclear industry is facing some significant human resources challenges, but new research carried out by Airswift and Energy Jobline indicates that the nuclear sector can still compete for talent. It has an experienced cadre of managers and technicians, but needs to recruit replacement expertise as its existing specialists approach retirement age. Research from Airswift and Energy Jobline's Global Energy Talent Index (GETI) survey reveals:

- The nuclear industry may have to increase wages to keep its staff, especially in countries where governments want it to expand nuclear initiatives.
- The nuclear industry has an ageing workforce and needs to recruit new professionals as they retire.
- It should showcase strong health and retirement benefits packages to attract the new staff it needs.
- The nuclear industry outside North America has a strong expat component, making it easier to recruit staff from abroad.
- Professionals anticipate salary increases going forward.

Experts at Airswift note that the nuclear sector remains a significant energy employer. On a national basis in 2015, there were 51,537 people employed in USA nuclear power generation. Around 125,000 people are employed by the French nuclear power sector. British nuclear generation and related construction in 2014 employed 15,500 people full time.

Airswift CEO Peter Searle said: *"The GETI survey provides some concrete guidance as to how hiring managers can continue to attract top talent and successfully compete for skills in a crowded energy marketplace."*

"Nuclear power output has seen an increase of 1.3% in the last 12 months, indicating that the nuclear industry is growing significantly. A considerable amount of expansion will be in China and other emerging markets, giving recruiters the chance to place well-qualified nuclear professions in well-paying jobs."

"The research outlines what matters most to employees, where the opportunities are and shows where the workforce and employers fail to see eye-to-eye. If the sector can right that and continue to address how it will safely decommission assets and contribute to a low carbon community, it has some incredible opportunities ahead of it."



A considerable
amount of
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2

Survey Demographics

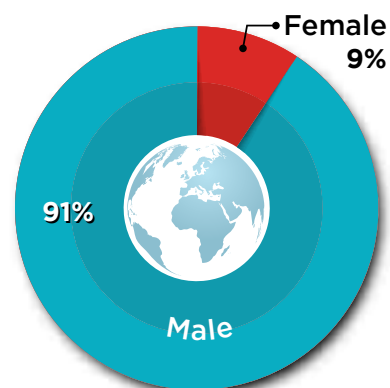
- The GETI data highlights that more than half (54%) of the nuclear workforce is aged over 45 years old.
- In contrast, graduate and entry level professionals make up only 5% of the global nuclear workforce.
- GETI data shows 9 out of 10 nuclear sector workers are male.
- In terms of nationality, American topped the list (36%), followed by British (30%) and Romanian (5%).
- Permanent positions make up 73% of the nuclear industry and is the highest representation across all energy sectors.

“The professionals in real demand are those with knowledge of all basic disciplines required within the industry – the pool of talent that will supply tomorrow’s managers,” said Hannah Peet, managing director of Energy Jobline. “In the USA, 39% of the country’s 2014 nuclear workers could retire by 2018 if they wished – leaving a 20,000 shortfall – and these jobs need to be filled.”

“Additionally, the nuclear sector needs to examine its failure to attract female talent as it addresses upcoming skills shortfalls.”

“This will require some root-and-branch human resources analysis and some real honesty by managers. The industry needs to recruit more women to have a successful future.” said Janette Marx, COO of Airswift.

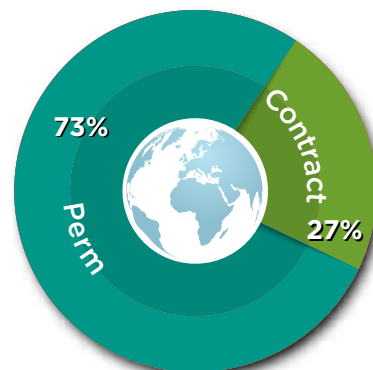
Gender (Professionals)



What is your employment level? (Professionals)

	Global	Female	Male
Graduate	5%	4%	5%
Intermediate	40%	50%	40%
Senior Manager	50%	42%	50%
Vice President / Director	5%	4%	6%

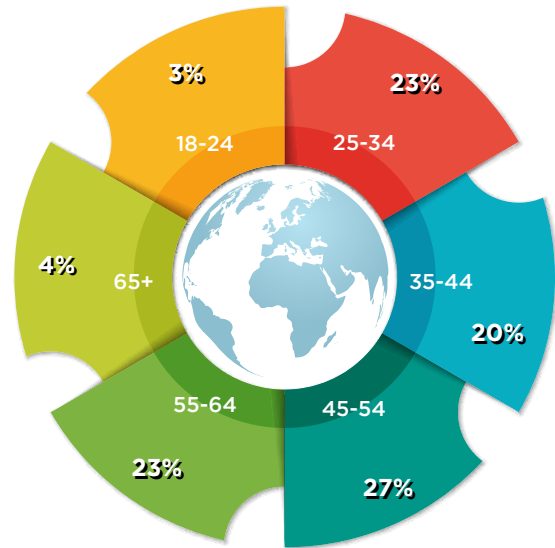
Contract versus Perm (Professionals)



Respondents by disciplines (Professionals)

Engineering	35%
Commercial	20%
Commissioning	10%
Safety	7%
Decommissioning	7%
Manufacturing	6%
Mechanical	4%
Planning	3%
Research & development	2%
Scientific	2%
Environmental	2%
Surveying	1%

Age (Professionals)



Discipline titles (Professionals)

Project Coordinator	13%
Mechanical Engineer	8%
Electrical Engineer	7%
Construction Manager	6%
Technical Engineer	6%
Quality Assurance	5%
Process Operator	4%
Construction Engineer	4%
Chemical Engineer	3%
Quality Control Engineer	3%
HSSE Manager	3%
R&D Scientist	3%
Training Coordinator	3%
HSSE Engineer	2%
Maintenance Engineer	2%
Client Services Mgr.	2%
Mechanical Designer	2%
Hazard Specialist	2%
Administrator	2%
Construction Rep.	2%

Nationality (Professionals)

American	36%
British	30%
Romanian	5%
French	4%
Spanish	2%
Indian	2%
Canadian	2%
Italian	2%
South African	2%
Egyptian	1%
Russian	1%
Belgian	1%
Jordanian	1%
Slovak	1%
Irish	1%
Pakistani	1%
Philippine	1%
Taiwanese	1%
Chinese	1%
Bulgarian	1%

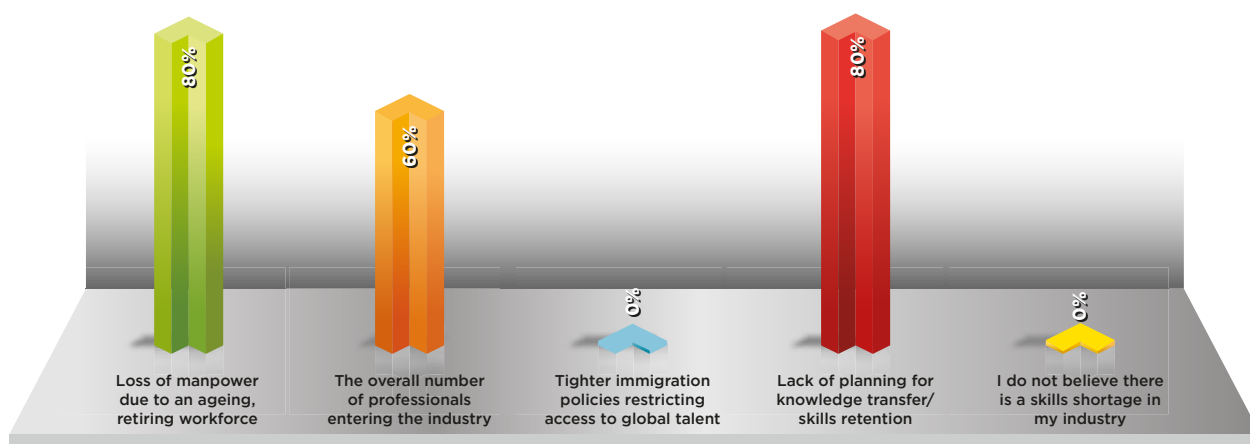
3 Skills

- The 'loss of manpower due to an ageing and retiring workforce' is cited in the GETI survey as the key problem facing the nuclear industry by 80% of hiring managers (compared to 4% in renewables).
- The same number of hiring managers blame a previous lack of planning for knowledge transfer/ skills retention for skills shortages.
- All respondents felt that a skills gap does exist in the industry.

- A third of respondents (31%) have more than 25 years experience in the sector.

Peet commented: "Hiring managers can use the data from the GETI survey to help plug the skills gap. If they plan now they can avoid previous failures and ensure a new generation has the necessary training and expertise to carry the industry forward."

What do you feel are the key causes for skills shortages within your industry? (Hiring Managers)

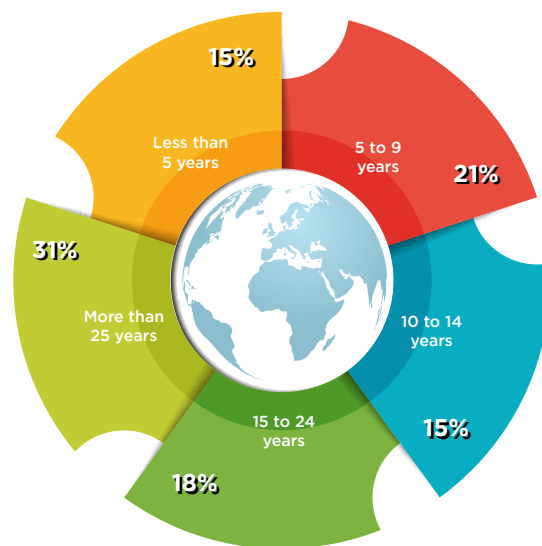


How do you believe employers can overcome the skills gap? (Hiring Managers)



NB respondents could opt for multiple answers

Years of experience (Professionals)



4

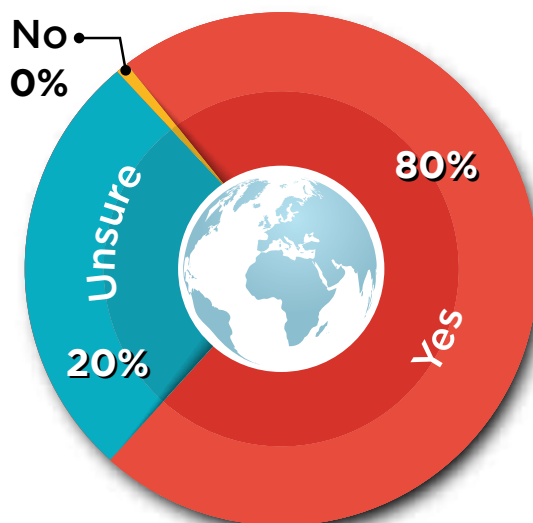
Hiring

- Over half of managers (60%) are currently hiring.
- Three quarters of hiring managers said they are hiring between 11 and 20 people in the next 12 months.
- Even more optimistically another quarter said they would be hiring between 51 and 100 people over the same period.
- 72% of professionals are interested in working within other energy sectors; the most popular choices were the oil and gas and power industries.

- However, the nuclear sector has the highest percentage of professionals not prepared to move sector (16%) which compares to 11% in the power sector.
- 4 out of 5 hiring managers said they would look to hire from other sectors.
- The overwhelming motivation given was to increase the potential size of talent pool.

Searle said: "It's encouraging that GETI shows so many companies are hiring. The nuclear sector can capitalise on a displaced oil and gas workforce by transferring their skills into the workforce."

Would you hire professionals from other energy sectors? (Hiring Managers)

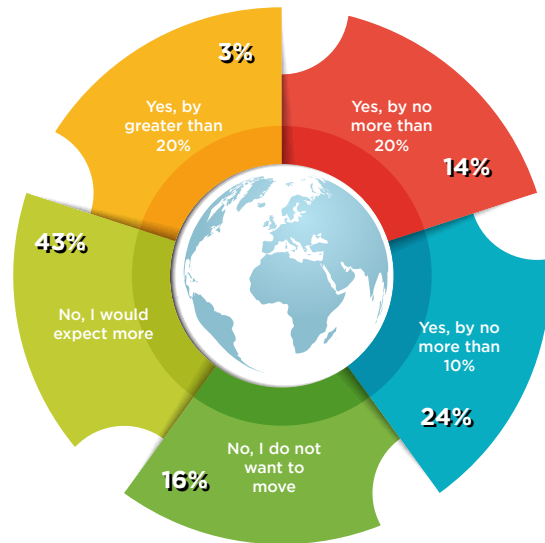


What are the advantages of hiring talent from outside your sector? (Hiring Managers)

	Global
Added skill set	40%
Wider talent pool	100%
Potential cost savings	0%
New way of thinking	60%
Other	0%

NB respondents could opt for multiple answers

Would you reduce your salary to move to another sector? (Professionals)



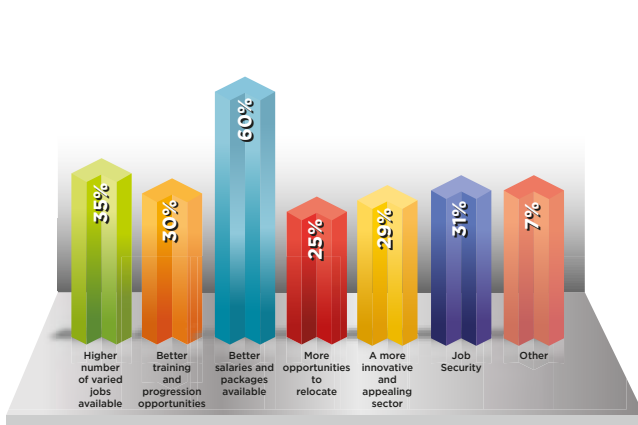
In which alternative energy sector are you most interested in working? (Professionals)

Renewables	18%
Power	20%
Oil & Gas	20%
Chemicals	14%

What is your outlook for hiring new talent? (Hiring Managers)

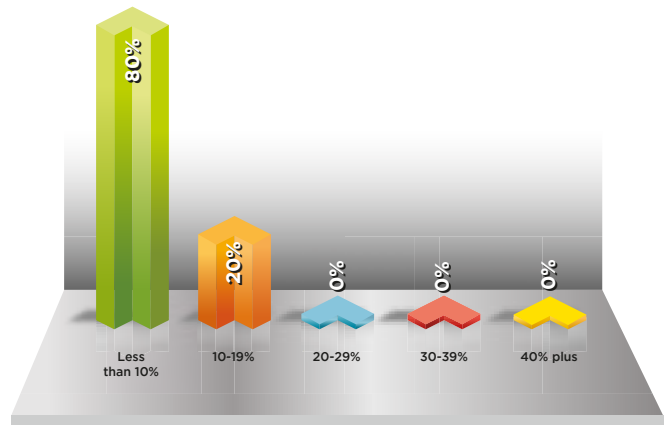
	Less than 10	11-20	21-50	51-100	101+
Next 6 Months	50%	50%	0%	0%	0%
Next 12 Months	0%	75%	0%	25%	0%
Next 18 Months	0%	50%	25%	25%	0%

What would be your reasons for changing sector? (Professionals)



NB respondents could opt for multiple answers

What percentage of your workforce have been laid off in the last 12 months? (Hiring Managers)



5

Salary and Benefits

- 6 in 10 employees expect salaries to rise compared to only 4 in 10 hiring managers.
- Employees value a health plan the most (62%), followed by retirement/pension package (60%).
- In North America, a health plan far outweighs other benefits with 86% of the vote compared to just two fifths of European respondents naming it top.
- In Europe, pensions came out as the top benefit with 57% of the vote.

Peet added: "While the nuclear sector's pay is not as high as some other competing energy sectors, it does offer more

stable employment, compared to the oil and gas industry. Nuclear energy is not a commodity sold on global markets, so job security is far more solid than in the fossil fuel sector.

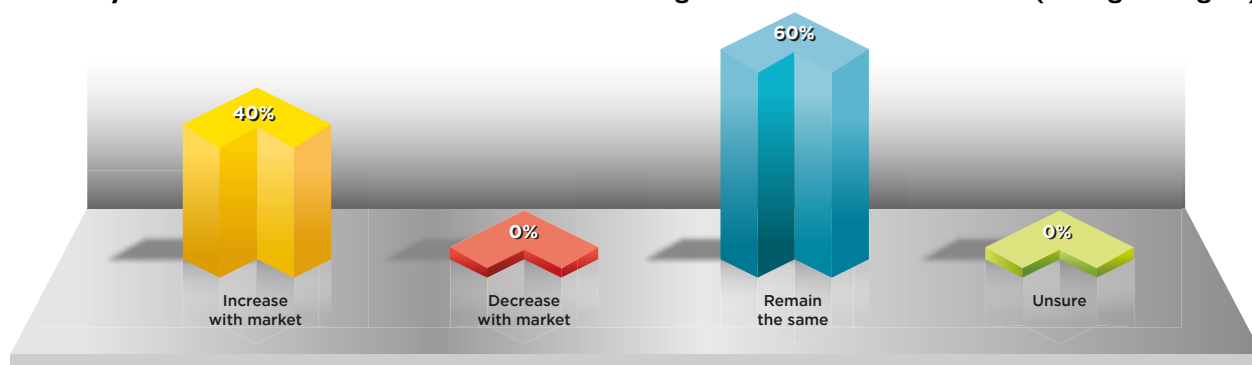
"For some energy professionals, especially ones approaching middle age, this could be an attractive selling point when nuclear employers are hiring. This is important, because GETI data indicates that nuclear salaries are not always that high in energy sector terms. A European Project Manager in the power sector is paid, on average, US\$75,323, compared to \$66,169 in the nuclear sector.

"The nuclear industry needs to use its robust benefit offering and relative stability to its advantage."

How do you think salaries and remuneration will change over the next 12 months? (Professionals)

	Global	Asia	CIS	Europe	Middle East	North America
Remain the same	64%	92%	50%	62%	75%	65%
Likely to increase	23%	8%	25%	21%	25%	25%
Likely to decrease	3%	0%	0%	4%	0%	3%
Unsure	10%	0%	25%	13%	0%	7%

How do you think salaries and remuneration will change over the next 12 months? (Hiring Managers)



What benefits do you currently receive? (Professionals)

	Global	Asia	CIS	Europe	Middle East	North America
Health plan	62%	86%	50%	43%	75%	86%
Retirement Plan/Pension	60%	64%	25%	57%	0%	73%
Training	52%	57%	75%	45%	50%	59%
Overtime Pay	41%	57%	75%	26%	33%	58%
Bonuses/Commission	41%	86%	25%	30%	17%	50%
Transport Allowance	34%	86%	50%	36%	67%	21%
Housing/Relocation	34%	79%	25%	29%	75%	29%
Flights/Leave Allowance	21%	57%	25%	15%	67%	16%
I do not receive any benefits	14%	0%	25%	23%	0%	5%
Schooling	13%	29%	25%	5%	8%	21%
Share Scheme	8%	7%	25%	11%	0%	4%
Hazardous Pay	7%	29%	0%	7%	0%	3%
Tax Assistance	7%	36%	0%	9%	0%	0%
Hardship Allowance	6%	57%	0%	2%	0%	4%
Meal Allowance	0%	0%	0%	0%	0%	0%
Commission	0%	0%	0%	0%	0%	0%
Relocation Package	0%	0%	0%	0%	0%	0%

NB respondents could opt for multiple answers

What benefit do you value the most? (Professionals)

	Global	Asia	CIS	Europe	Middle East	North America
Health plan	40%	36%	33%	19%	50%	61%
Bonus	13%	29%	0%	17%	8%	7%
Retirement/Pension	23%	0%	33%	35%	17%	15%
Transport Allowance	2%	0%	0%	3%	0%	0%
Training	2%	7%	0%	2%	0%	1%
Flights/Leave allowance	3%	0%	0%	7%	0%	0%
Housing/Relocation	8%	14%	0%	14%	0%	1%
Hardship Allowance	1%	7%	33%	0%	8%	0%
Overtime Pay	7%	7%	0%	3%	0%	13%
Schooling	1%	0%	0%	0%	8%	1%
Share Scheme	0%	0%	0%	0%	0%	1%
Hazardous Pay	0%	0%	0%	0%	8%	0%
Tax Assistance	0%	0%	0%	1%	0%	0%

5

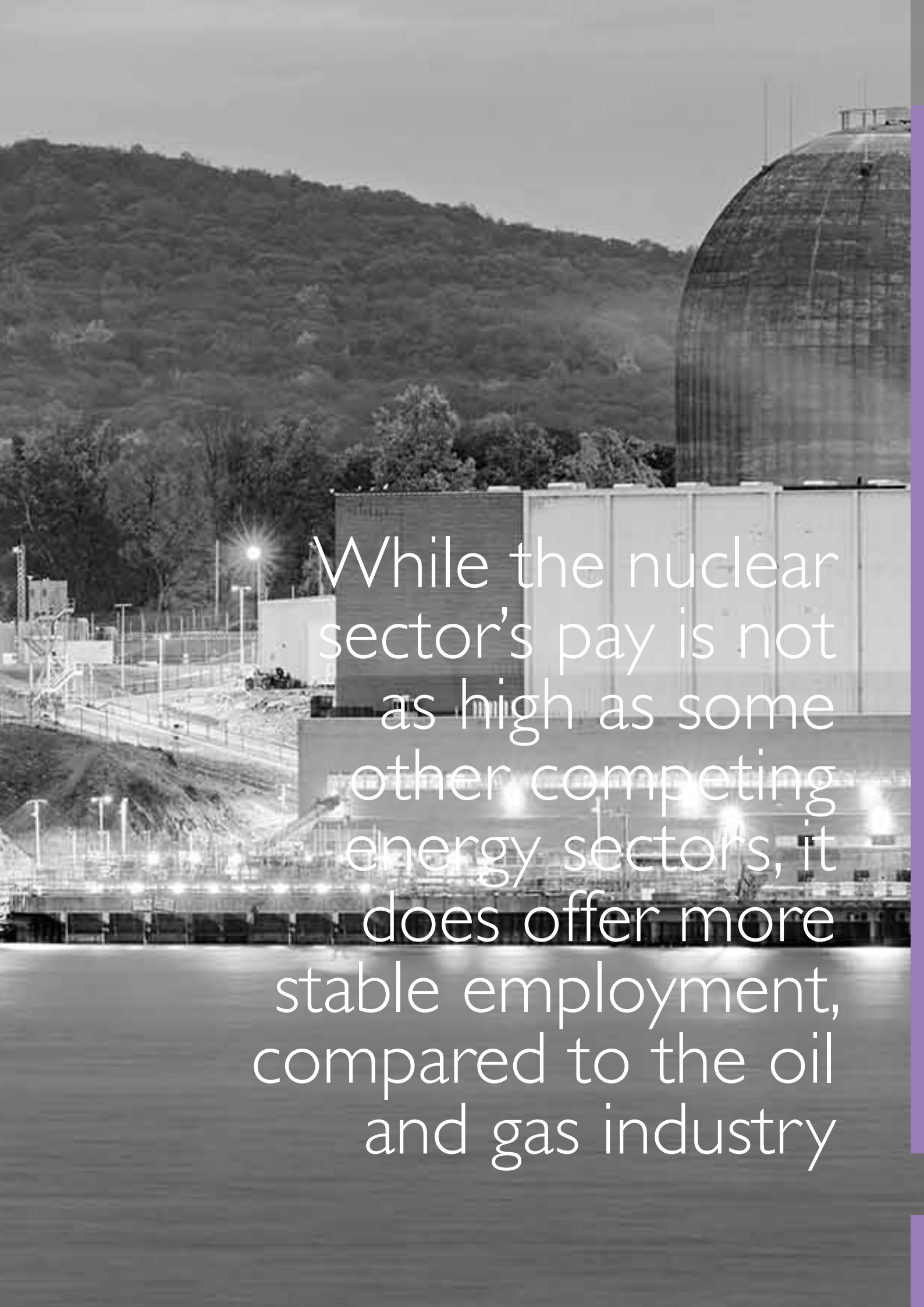
Salary and Benefits

Permanent salaries by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Project Manager	61,430	80,027	54,987	66,169	76,616	60,025
Mechanical Engineer	74,430	77,231	51,468	54,195	82,961	80,543
Electrical Engineer	59,987	71,198	60,210	54,959	87,124	76,939
Construction Manager	61,121	69,871	50,296	62,319	89,561	71,719
QA/QC Manager	39,120	51,139	52,178	59,897	54,124	48,134
Process Engineer	49,981	55,978	47,195	65,271	51,321	76,269
Chemical Engineer	52,391	59,891	48,626	61,112	51,974	80,510
HSE Manager	44,231	77,519	49,967	57,508	77,519	39,561
Nuclear Engineer	39,371	81,217	48,812	46,876	41,239	83,765
R&D Scientist	33,876	67,120	44,866	65,619	40,093	73,853
Training Coordinator	35,428	44,387	73,313	63,032	46,120	49,859
Maintenance Engineer	41,213	65,230	56,756	61,995	59,129	70,265
Purchasing Manager/Buyer	30,298	54,549	60,279	59,957	51,245	60,672
Planner/Scheduler	31,239	62,482	53,349	55,822	55,677	61,021
Environmental Engineer	36,548	66,578	62,686	63,090	59,789	72,121
Facilities Manager	38,237	50,239	62,334	52,529	56,239	54,587
Commissioning Engineer	37,234	61,235	51,234	57,845	49,298	68,084
Supply Chain Manager	31,211	44,598	50,129	51,234	47,341	50,067
Business Development Manager	49,281	78,254	64,497	62,340	67,389	73,245
Commercial Manager	44,288	71,120	49,656	64,457	62,230	76,473

Contract day rates by region (US\$)

	Africa	Asia	Australasia	Europe	Middle East	North America
Project Manager	359	389	358	530	397	324
Mechanical Engineer	306	252	291	505	362	603
Electrical Engineer	469	466	376	488	509	573
Construction Manager	432	517	434	584	500	564
QA/QC Manager	389	478	406	517	446	624
Process Engineer	358	406	419	563	530	594
Chemical Engineer	333	358	343	406	377	396
HSE Manager	416	483	288	532	255	406
Nuclear Engineer	329	354	361	444	396	468
R&D Scientist	397	426	376	446	409	497
Training Coordinator	265	358	267	312	361	262
Maintenance Engineer	376	514	451	553	426	473
Purchasing Manager/Buyer	401	458	276	595	403	483
Planner/Scheduler	378	406	391	497	406	514
Environmental Engineer	247	389	251	312	265	358
Facilities Manager	371	458	361	520	376	498
Commissioning Engineer	285	394	397	621	378	704
Supply Chain Manager	222	387	251	250	236	303
Business Development Manager	403	514	428	499	424	557
Commercial Manager	426	458	444	484	475	539



While the nuclear sector's pay is not as high as some other competing energy sectors, it does offer more stable employment, compared to the oil and gas industry



6

What Attracts Employees

- Salary banding was ranked as the most important attraction factor for employees (40%), followed by corporate culture (27%).
- Ethical reputation ranked third for employees (11%), while only 8% cited brand recognition.
- No employers cited ethical reputation, choosing only corporate culture (60%), brand recognition (20%) and salary banding (20%).

Marx said: “GETI data indicates that hiring managers could successfully stress the ethical benefits of working in the nuclear sector as part of their recruitment strategies. Younger workers especially are concerned about climate change and while nuclear energy generation creates

radioactive waste, it does not emit carbon.

“Meanwhile, precisely zero hiring managers thought ethics were a motivation behind energy professionals joining the nuclear wing of the industry.

“They might just be underestimating the reputation of their own sector, which has made great efforts since Fukushima to improve its safety and environmental record.”

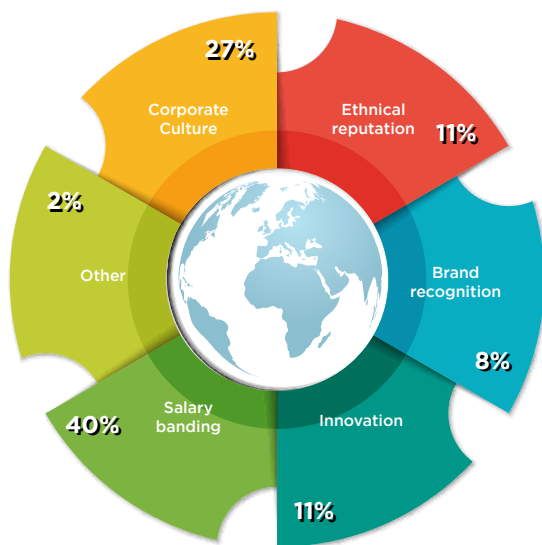
“Nuclear workers also expect pay increases,” added Peet. “And moreover, they expect to remain in employment. The nuclear sector offers predictable continuous employment and that really matters, especially for workers with younger families.”

Which factors do you consider when looking for a new role? (Professionals)

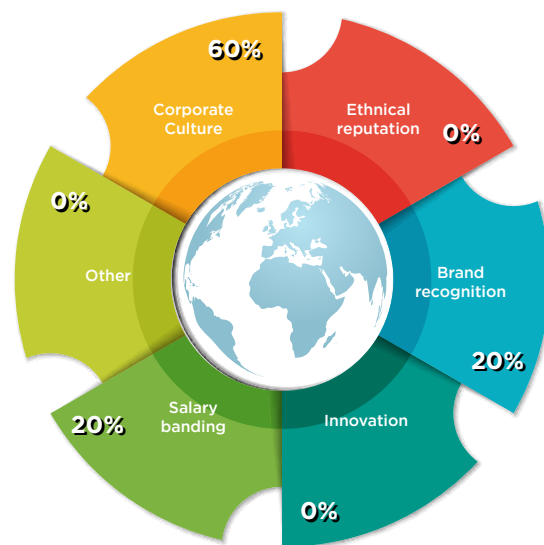
	Global	Asia	CIS	Europe	Middle East	North America
Base salary	84	100	50	81	92	87
Location	71	69	75	67	67	79
Challenging projects	58	62	25	61	58	53
Professional Development	50	62	75	52	50	45
Bonus/Commission structure	43	62	0	41	33	46
Retirement Plan	42	54	0	30	58	55
Relocation/Housing Package	39	62	0	29	50	50
Home Leave/Allowance	30	69	0	25	50	34
Tax Assistance	11	15	0	14	8	9
Other (please specify)	10	8	0	12	0	10
Hardship Allowance	10	38	25	11	0	6
Share Scheme	10	8	0	12	0	9
International Schooling	9	8	25	10	33	4

NB respondents could opt for multiple answers

What do you believe attracts more employees to a company? (Professionals)



What do you believe attracts more employees to your company? (Hiring Managers)



7

Global Mobility – contracting and career progression

- A high proportion (80%) of nuclear companies are looking to diversify into other regions or fields in the next 12 months.
- 8 in 10 hiring managers cited Europe as having the most potential.
- The majority of employees (24%), also cited Europe as their preferred region to work.
- The nuclear industry has the highest proportion of local workers compared to other energy sectors.
- Only 2% of North American nuclear workers are expats, compared to 21% in Europe.
- Globally, one fifth of nuclear professionals work outside their home country.

Searle commented: “While the nuclear sector’s presence is far from uniform worldwide, GETI research indicates that there are enough countries able to offer nuclear careers to expats.

“Moreover, the GETI data shows this is an international industry that gives hiring managers the opportunity of recruiting talent worldwide. The research demonstrates that when trying to tempt professionals to move, recruiters will need to be careful, and craft their offers to match the right location with the right employee. Where a nuclear professional is located is more important than base salary.

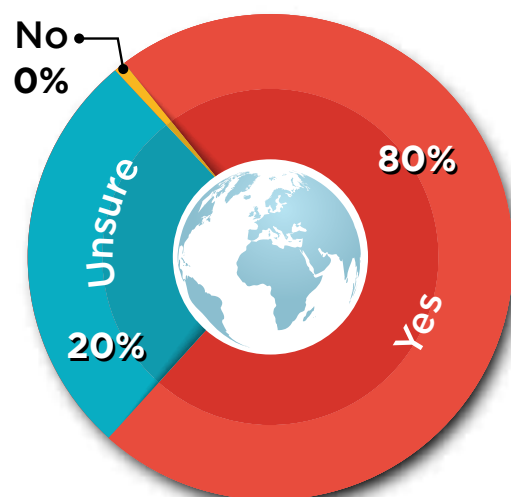
“In terms of location, Europe topped the chart for both employers and employees.”

Marx added: “Fortunately, the nuclear industry is big, international and growing – giving recruiters leeway to make successful relocation offers. Nuclear energy supplied 5% of the world’s total primary energy supply (TPES) in 2014, and 10% of TPES in developed countries within the Organisation for Economic Cooperation & Development (OECD).

“The United States and France combined produce 40 per cent of all nuclear power, but other countries also have significant nuclear sectors.

“However, GETI data demonstrates that hiring managers will have to work hard to recruit the necessary staff for the world’s largest nuclear growth zone – Asia. There is a clear mismatch between the number of positions recruiters want to fill in Asia and where nuclear professionals want to live and work – this region is clearly not the most popular.”

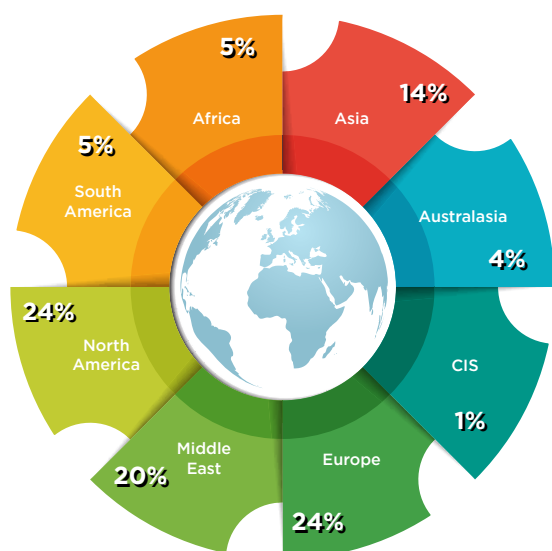
Would your company embark on a diversification strategy in regions or other fields outside of your core business in the next 12 months? (Hiring Managers)



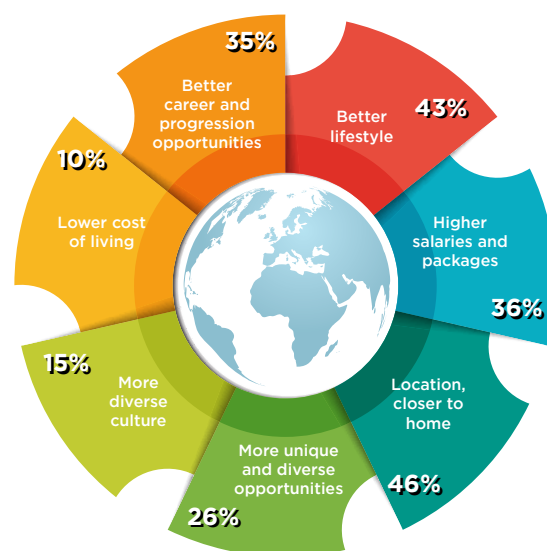
Local versus Expat

	Global	Asia	CIS	Europe	Middle East	North America	South America
Expat	18%	53%	20%	21%	94%	2%	1%
Local	82%	47%	80%	79%	6%	98%	99%

Which is your preferred region of work? (Professionals)

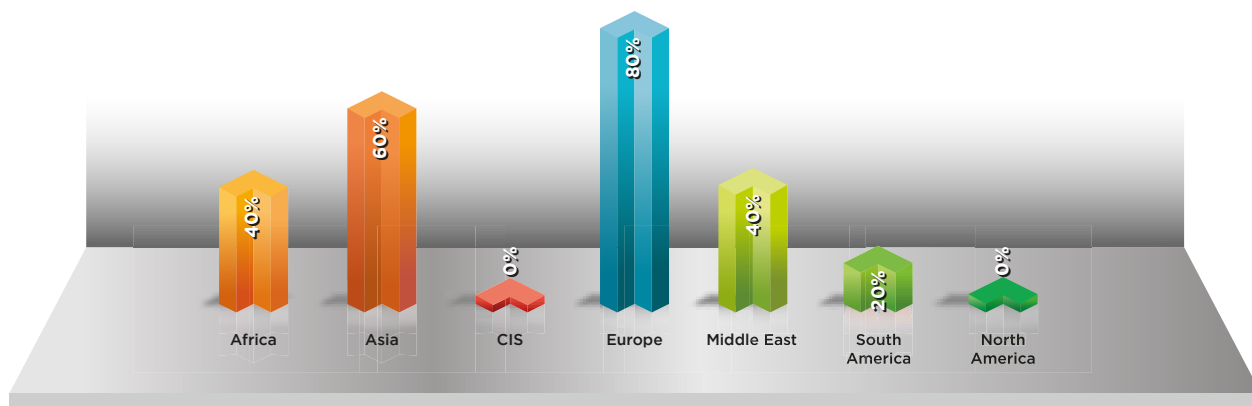


What are your reasons for wanting to work in your preferred region? (Professionals)



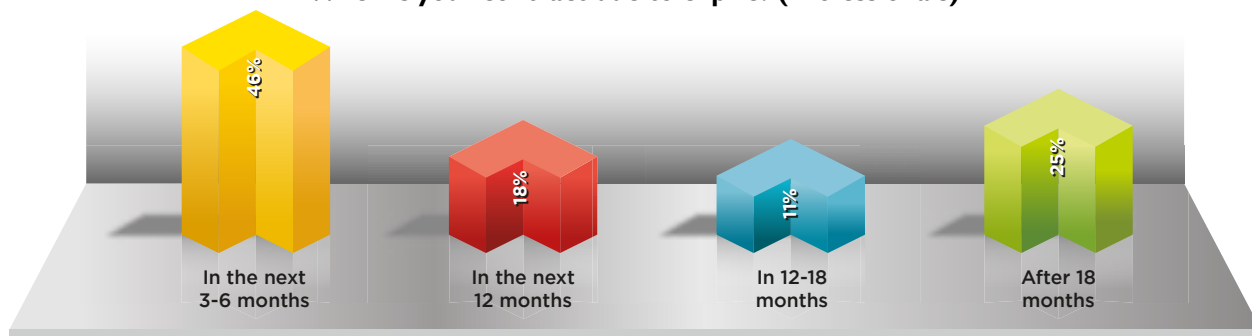
NB respondents could opt for multiple answers

Which regions do you feel are potential hot spots across the energy industry? (Hiring Managers)



NB respondents could opt for multiple answers

When is your contract due to expire? (Professionals)





8

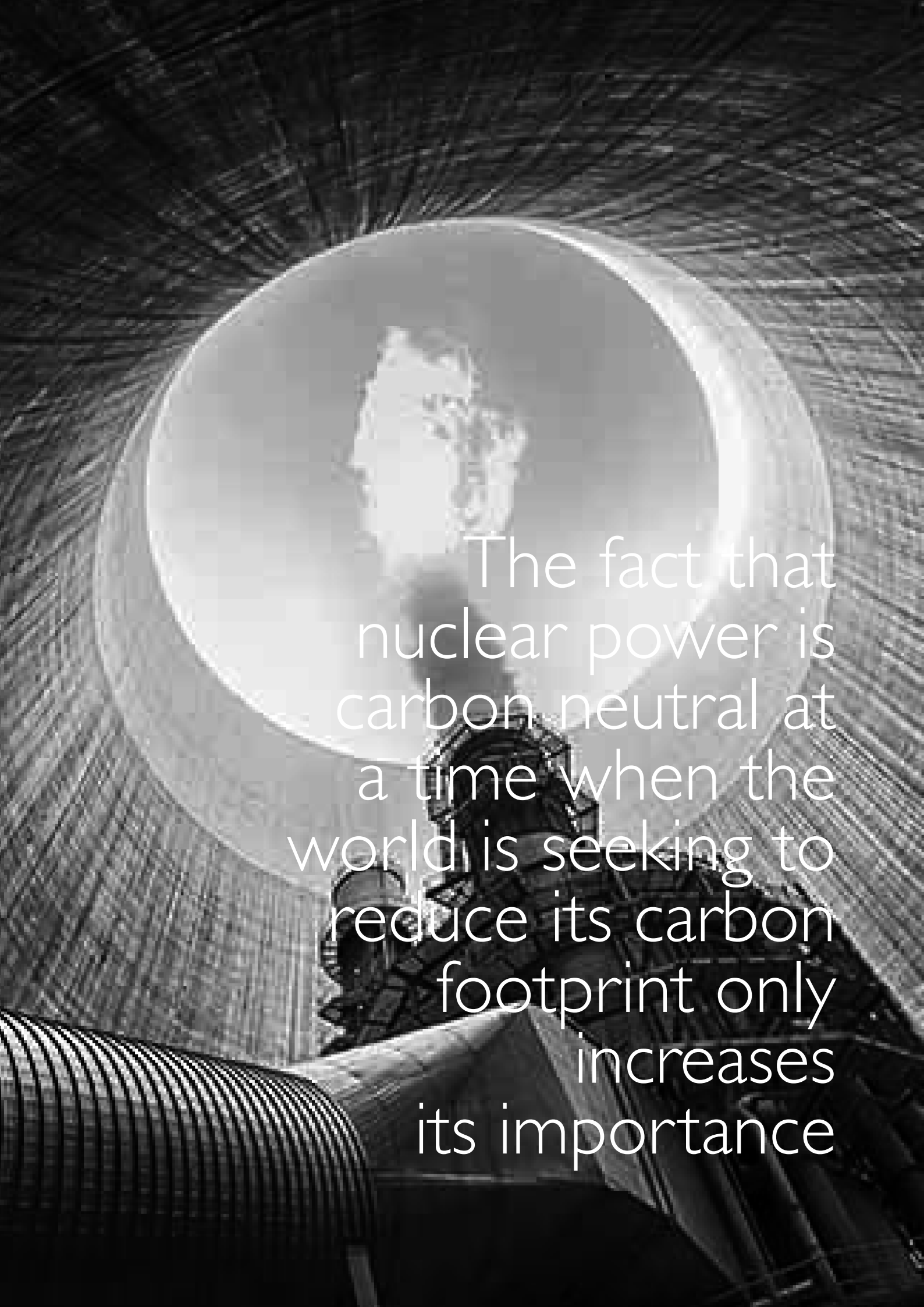
Final Thoughts

Peet said: *“Despite the advances in other areas of power generation such as renewables, the nuclear sector will continue be an essential part of the global energy mix for the foreseeable future.*

“The reality is that the world faces tightening demand for energy in the short and medium term that only the retention or even growth of nuclear power can ease. The fact that nuclear power is carbon neutral at a time when the world is seeking to reduce its carbon footprint only increases its importance, so the construction of new

nuclear plants can be anticipated around the world.

“This growth means nuclear professionals will be needed. The industry is facing a staffing problem, with ageing workers approaching retirement age. But the GETI research indicates that nuclear power can be an attractive choice for professionals seeking stable work. It offers solid, reliable salaries, as well as excellent health and retirement benefits that can attract energy workers wanting dependable employment.”

A black and white photograph featuring a large, circular opening in a dark, textured wall. Inside the circle, a person's face is visible, looking directly at the camera. In the foreground, a large, coiled metal spring or wire is visible on the left side. The text is overlaid on the right side of the image, partially covering the circular opening and the foreground coil.

The fact that
nuclear power is
carbon neutral at
a time when the
world is seeking to
reduce its carbon
footprint only
increases
its importance

About us



Airswift is an international workforce solutions provider within the energy, process and infrastructure industries.

We serve as a strategic partner to our clients, offering a turnkey workforce solution to capture and deliver the top talent needed to complete successful projects. Our expert team of recruitment consultants are also ideally positioned to help candidates find their next role, while our global mobility teams support them every step of the way.

With over 800 employees in 52 offices worldwide, 6,000 contractors and a candidate database of 500,000, our geographical reach and pool of talent available is unmatched in the industry and the level of experience that the organisation has is unparalleled.

Airswift works with 100% of the world's supermajors and is ideally placed to be the global leader of workforce solutions to our target industries.

Our expertise covers a range of service lines, including talent acquisition, global employment, global mobility, managed solutions and consultancy.

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Energy Jobline is the leading specialist job board for energy globally and currently hosts a database of over 750,000 professionals, advertising over 10,000 of the world's top energy jobs. Energy Jobline (EJL) offers talented industry professionals exciting opportunities in the Oil & Gas, Renewables, Power, Nuclear and Petrochemicals sectors.

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