Brunel

OILANDGAS JOBSEARCH

ENERGY OUTLOOK

2021/22 REPORT

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Executive Summary & Key Insights

The global energy industry is accustomed to change. Dramatic economic cycles, political influences, and disruptive technologies are all contributing factors in the ever-evolving sector. Today, we're seeing the influences of new factors and perspectives, including shifts in workforce capabilities, environmental attitudes, and job engagement.

The 2021/22 Energy Outlook Report provides an overview of the current state of the global energy industry. It provides employers with practical advice on how to close their skills gaps, increase and improve diversity, position their brand, and attract top talent in a fiercely competitive job market.

About the Study

Brunel and Oilandgasjobsearch.com commissioned an independent research firm to survey global energy-industry recruiters and workers. The study identifies and explores the changes that are on the horizon over the coming year, and the ways in which companies are adapting. The report focuses on areas such as recruitment challenges, compensation, sustainability, job engagement, and retention in the energy sector. Some key insights from this year's report include:

- **More than ever before, there's a big shift in career direction**
  This year, when asked which sectors they'd pursue employment opportunities in, those working in Oil and Gas said renewables (56%), compared to 38.8% last year. Similarly, those working in renewables are the most likely to have shifted into this sector within the past 12 months (51%).

- **In recruitment, applications per vacancies remain low**
  In order to attract new talent, companies are having to offer higher salaries, create attractive benefits packages, and offer flexible working opportunities.

- **Diversity and inclusion is becoming a top priority**
  Companies are becoming more aware of the need to create a diverse workforce and foster a culture of inclusion. Our survey finds that 31% of energy workers say they have personally been the target of workplace discrimination, and 43% say they have witnessed discrimination directed at others.

Introduction

2022 – A YEAR OF TRANSITION FOR THE ENERGY EMPLOYMENT MARKETS

Every year for the last decade, Oilandgasjobsearch.com has published its global survey, reviewing the state of the energy employment markets, and highlighting what we see as future trends. This year marks the second year of our collaboration with Brunel in publishing our Energy Outlook Report. We continue to be inspired and challenged to explore themes like the impact of COVID-19 and the energy transition, diversity and inclusion, and what companies are doing to bridge their skills gaps.

In 2022, the industry is still recovering from the repercussions of COVID-19 and throughout this report, we'll detail the impact of the pandemic on the industry by sector, region, and from the perspective of employers and energy workers. We collected nearly 17,000 questionnaires from jobseekers and recruitment professionals from around the globe and we've provided our analysis with the help of leading energy experts and employers. What's clear to us, is that the energy labour market will continue to be in a constant flux. Employers in the sector are used to facing energy bust and boom cycles, and we believe this is a new era of constant challenge. Energy skills transition, combined with the huge imbalance in labour markets caused by the "great resignation", will stretch employers wanting to re-hire like never before. I am borrowing only one piece of research from our Broadbean Technology team to predict a new battle for talent in energy. In 2021, post-COVID, the average numbers of applicants for a job in the energy sector has dropped by more than 20% compared to 5 years ago.

We hope this year's report will provide useful insights into the current state of the energy employment industry and where it's headed over the coming years. We've also included actionable advice to help employers make the most of our survey findings and futureproof their businesses by securing a diverse talent pipeline.

Once again, I'd like to congratulate the amazing team at Oilandgasjobsearch.com and Energyjobsearch.com, as well as our partners that have helped shape this report. Elsa, Hari, Gareth, Jesse and all our partners at Brunel and Trend Candy - thank you for all your efforts.

On behalf of our team, I wish you a pleasant reading and we look forward to meeting you and discussing your questions at launch events virtually and physically around the world.

ALEX FOURLIS
MANAGEING DIRECTOR OF OILANDGASJOBSEARCH.COM AND ENERGYJOBSEARCH.COM
The leading jobsites for the energy market

A BRIGHTER FUTURE

I would like to extend a very warm welcome and a big thank you to those of you who have assisted us in completing the Energy Outlook Survey. Every year it surprises me just how many thousands of Energy specialists complete the survey providing critical insights that allow us to position current trends and predict future ones.

When I last addressed the readers of the this report we were in the midst of the COVID-19 crisis and today as the world continues to evolve, what we knew as "normal" has changed dramatically.

Brunel has also evolved – we have strengthened our focus and strategy and encouraged internal training and development. This has allowed us to thrive. Brunel is powerfully positioned to partner with our clients and deliver creative solutions to reinforce their goals and success in their challenge to lead the digital and energy transition. **People are our Passion** and we're strongly focused on building and developing our network of specialists. Connecting specialists with our clients' pioneering projects in order to achieve their ambitions and long-term career goals.

The energy industry is changing dramatically, and where there is change, there are always new opportunities. Confidence has returned to the industry and is resulting in fresh opportunities for specialists. Advances in science and technology are all responsible for the acceleration of progress, significantly increasing energy efficiency, re-defining the energy transition and driving ground-breaking ideas that will power the globe in the future. Perfect timing for the future generations of specialists who are considering entering the industry.

No matter where you are in the world or which part of the energy industry you are affiliated to, this year's results clearly demonstrate the trends behind the challenges that we are experiencing today.

Several of the findings can educate us as to how we can take positive steps together to overcome specific challenges, including topics such as supply chain, diversity & inclusion and attracting and retaining talent.

I believe these challenges are something we all have the power to change together. The responsibility is on us to build and improve the future of the industry.

JILKO ANDRINGA
CEO BRUNEL INTERNATIONAL N.V.
Connecting Specialists to Pioneering Projects

Winds of Change

Winds of Change describes the key findings from the survey that highlight a shift in concern regarding topics effecting the global energy industry. Including: Supply chain challenges, skill shortages, job security and environmental attitudes.

Key Insights:

- **31% of recruiters say the biggest challenge the energy industry is facing is an ageing workforce and associated skills shortages**
- **From an environmental viewpoint, the biggest challenge is the reduced demand for Oil and Gas due to increasing interest in renewables and alternative energies (34%)**
- **Workers in the Oil and Gas sector are less confident in finding work than they were last year, with 75% saying they are extremely-to-moderately confident, compared to 81% last year**

Supply Chain Disruption

When gas prices are high, the repercussions are felt every day. It impacts how we commute, how we heat our homes, how goods are shipped, and how companies position themselves in their industries.

> **Throughout 2020, gas was in high demand in Asia and due to storage capacity issues in the region, inventories of gas were low and continue to struggle to recover. This has caused high gas prices, which in turn, has had a knock-on effect on other regions around the world. Competition for cargos of Liquefied Natural Gas (LNG) in order to boost supplies is high. Good news for LNG companies but no so good news for end customers.**
>
> — Jon Proctor, Managing Director, South East Asia - Brunel

Restarting the supply chain network after lockdown has been challenging. It's a monumental task that has required synchronization between many partners, working together to transport raw materials around the globe.

In addition to COVID-19, increased demand for specialist components like semiconductors and metals, and the increase in transportation and shipping costs (due to high gas prices), has slowed down the supply chain network and is threatening global economies.

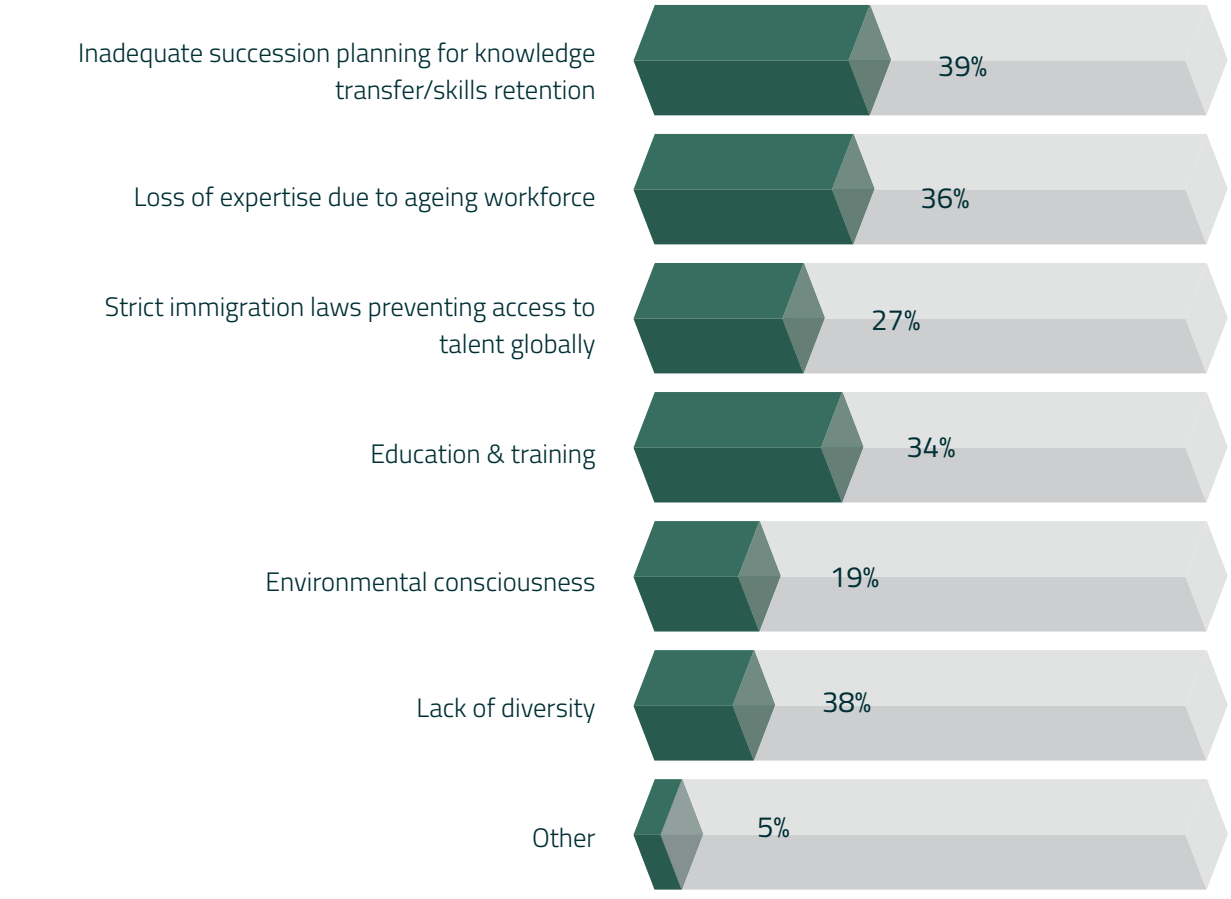
> **The biggest challenge with high gas prices isn't always a lack of supply, but a shortage of labour to extract the resources. COVID-19 lockdowns have had a detrimental impact over the past couple of years, and with many people still self-isolating, some smaller companies have been forced to close, creating vulnerabilities in a network where predictability is paramount.**
>
> — Hari Singh, Sales Director - Oilandgasjobsearch.com and Energyjobsearch.com

Skills Shortages

When asked about the biggest challenge the industry is facing, 31% of recruiters said the ageing workforce and skills shortages. They said the key cause of skills shortages is inadequate succession planning for knowledge transfer and skills retention (39%), followed by the loss of expertise due to an ageing workforce (36%), and education & training (34%).

The disciplines most impacted by skills shortages were Operations, Maintenance, and Production (16%), followed by Drilling and Well Delivery (15%), and Construction, Subsea, and Pipelines (13%). Specialised skills have always been difficult to recruit for in the energy industry, so it's no surprise to find those related to the Oil and Gas and Subsea sectors are in short supply.

KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



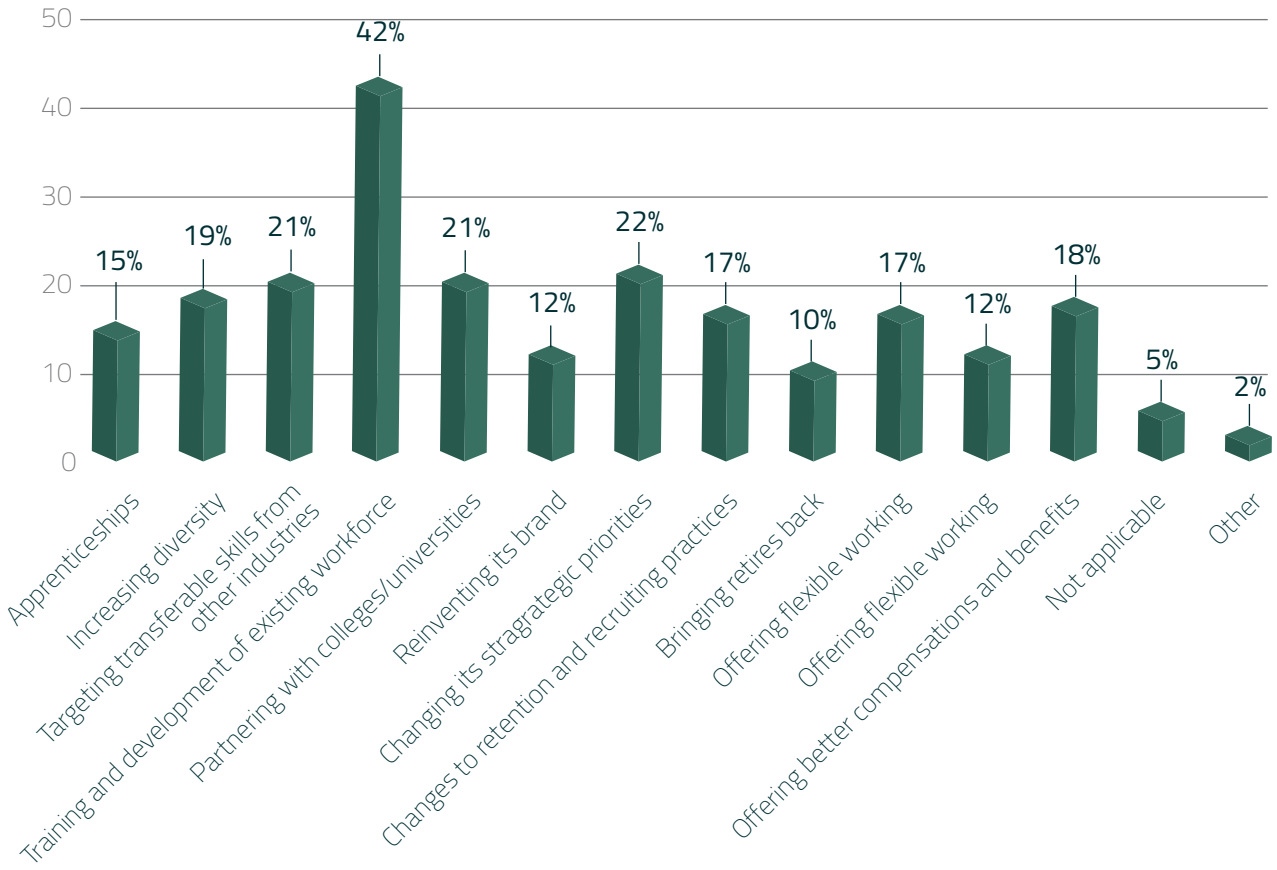
*Statistic details on page 74

> **The skills shortage has been a challenge that we've consistently outlined in our outlook report over the past decade. Retaining existing skillsets has never been so important given the impact of the pandemic on the workforce and the ongoing energy transition. Current employee sentiment points strongly to a better work-life balance and a safer working environment, thus shifting the goal posts for employers to make necessary changes. Engaging new talent and re-engaging pre-existing talent can also combat the skills shortage. Employers in the industry can focus more of their attention on amplifying their company values towards climate change, training & development, diversity and inclusivity in the workforce.**
>
> — Gareth Ford, Business Development Manager - Oilandgasjobsearch.com

When asked about the actions they were taking to overcome the skills shortage, the most common answer companies gave was organising training, and developing their existing workforce (42%). This was followed by changing their strategic priorities (22%), targeting transferable skills from other industries (21%), and partnering with colleges and universities (21%).

Over the past couple of years, lockdowns and slower activity levels have led to supply chain backlogs. Coupled with the pre-existing skills shortage in traditional energy sectors like Oil and Gas, the situation looks to be worsening and spreading into other sectors. Whereas the industry is evolving, driven by the need for digital transformation, workforce learning and development can't keep up with the pace.

WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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Companies need to focus on upskilling workers to keep up with demand for specialist expertise. Upskilling can be an effective short-term solution to bridging skills gaps, likewise, broadening the talent search to industries outside of the energy sectors can provide access to untapped talent. Rebranding to align with industry trends can also help attract young workers and top talent, who are looking to work for a company that share their values.

> **Energy industry companies are currently facing an enormous challenge to position themselves as an attractive employer in an industry which is often seen as a negative contributor to the future of the planet. To be successful in attracting the next generation of talented specialists, a focus on innovation, new technology and digitalisation will be key to educate and inspire young minds. Timing is also important, as is connecting with young people and delivering the right messages before they select their future studies to ensure more professionals enter the industry.**
>
> — Nicole Kirleis, Global Head Marketing & Communication - Brunel

In the long-term, employers need to secure their talent pipeline by influencing the next generation of workers. Partnering with schools and colleges and offering apprenticeship programmes can be a good way of raising awareness of career opportunities in the industry and providing insights into how energy careers can progress.

Job Security

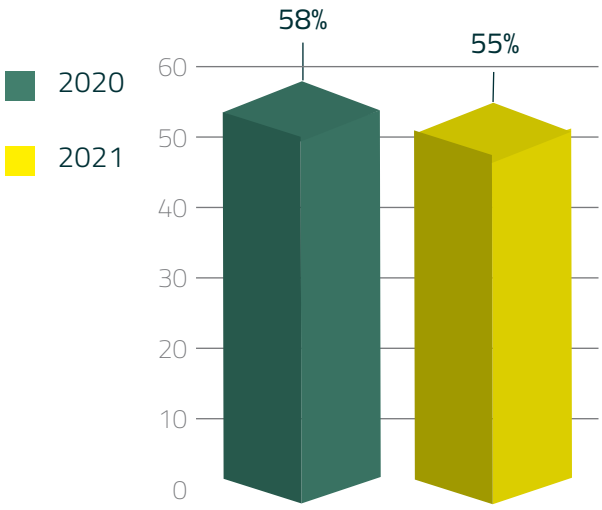
COVID-19 has had a significant impact on energy workers' outlook for the future. Supply chain disruptions, coupled with rising gas prices, understandably has had many workers questioning the security of their roles over the last couple of years. However, the energy industry is recovering and its future is far brighter than it was during the pandemic.

> **Oil and Gas hiring activity passed pre-COVID-19 levels earlier this summer and reached a three-year high in August. Increased prices for natural gas seem to be the driver, and overall, the energy and utilities sectors seem to be rebounding strong and reaching new highs.**
>
> — Alex Fourlis, Manageing Director of Oilandgasjobsearch.com and Energyjobsearch.com

Last year, 57.6% of workers said that another pandemic like COVID-19 would cause them to seek new employment. This year, however, 55% said the same, suggesting that workers are starting to feel more positive about their future in the industry.

When asked about location, 51% of energy workers said that they relocated for the role they last worked in. Those from the Middle East were the most likely to have relocated (68%), followed by those from Commonwealth countries (59%), and Asia (54%). It comes as no surprise that workers from these regions would seek new employment if there was another pandemic, given that they're currently working away from their home countries.

PERCENT OF WORKERS WHO WOULD SEEK NEW EMPLOYMENT IN CASE OF ANOTHER GLOBAL PANDEMIC LIKE COVID-19



> **Global lockdowns have enabled many workers and employers to experience a new way of working, whether it be through hybrid working, the way we engage, recognise and communicate with our teams. For most organisations it has "fast tracked" the voice of the employee around flexible working and employers now realise they need to remain agile to ensure the balance between employee engagement and driving organisational performance. As we continue to evolve through COVID, attracting and retaining talent will mean companies need to continue to adjust their employee value proposition to remain competitive and more connected to their workforce.**
>
> — Christine Anderson, Head of Global HR - Brunel

Environmental Attitudes

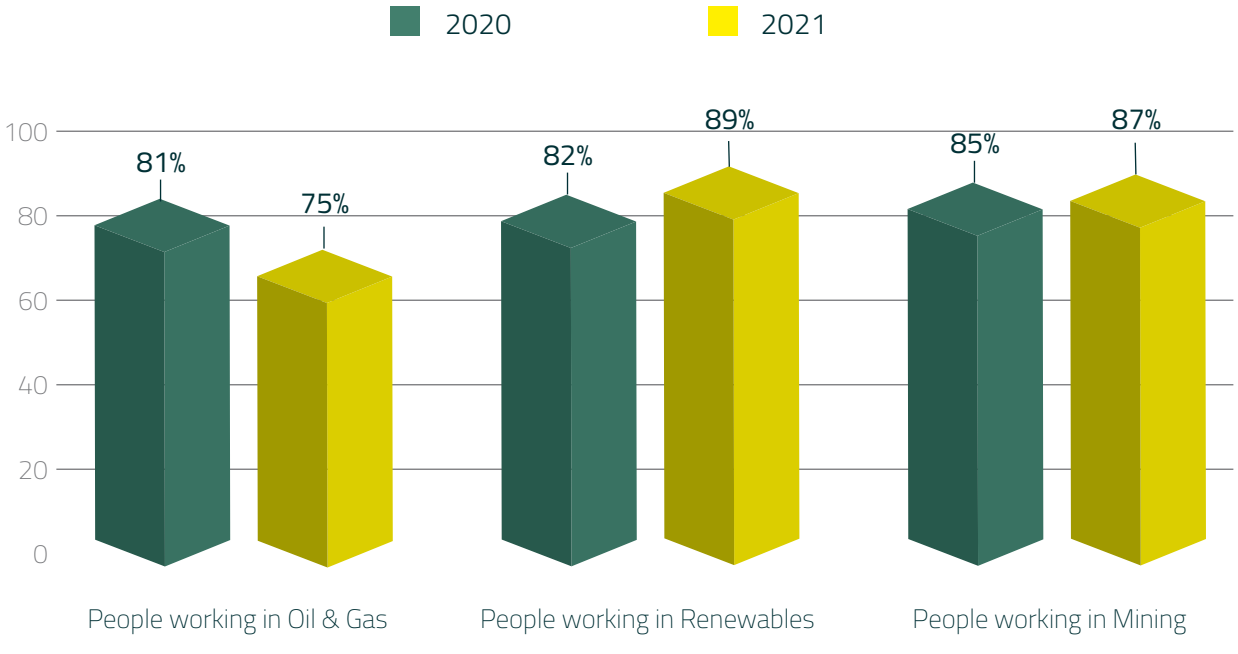
Supply chain backlogs and skills shortages aren't the only challenges the industry is facing. According to recruiters, the biggest challenge is the reduced demand for Oil and Gas due to the increasing interest in renewable and alternative energies (34%). This is followed by climate change fears as the world moves away from Oil and Gas (32%), and an ageing workforce (31%).

Last year, the biggest challenge cited by recruiters was the unpredictability of the energy industry and its constant cycles of boom and bust. Of course, this challenge remains, and traditional energy companies are having to re-shape their priorities to align with today's environmental narrative. With many countries having signed up to the Paris Agreement, and with this year's COP26 event focussed on keeping global warming to 1.5 degrees Celsius, an increasing number of companies are having to realign their positioning in order to fulfil the terms of the agreement to become a carbon net zero business.

This year's report finds that those working in Oil and Gas are less confident in finding new employment in the energy industry than those in other sectors. For example, in Oil and Gas, 75% of workers are extremely-to-moderately confident in finding new work, compared to 81% last year. In renewables, 89% are confident, compared to 82% last year, and in mining, 87% are confident, whereas 84.6% said the same last year.

With the drive towards net zero, an increasing number of companies are moving away from using fossil fuels. Whether upgrading transportation to electric or autonomous alternatives , or installing energy efficient power supply systems, fossil fuels

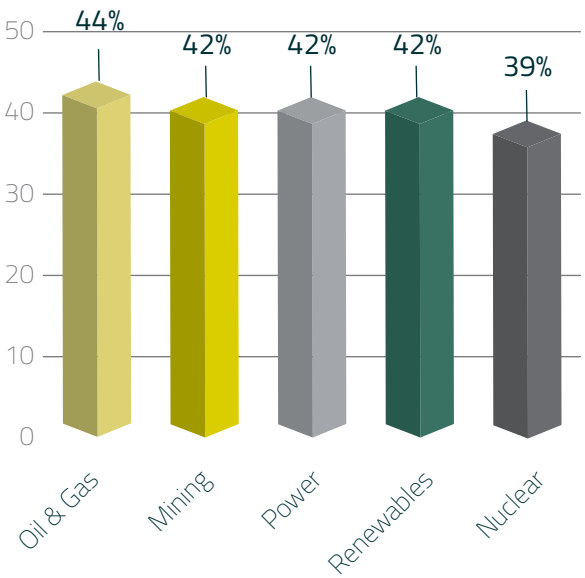
LEVEL OF CONFIDENCE IN FINDING NEW EMPLOYMENT IN THE ENERGY INDUSTRY (EXTREMELY TO MODERATELY CONFIDENT)



are gradually being sidelined. It's no surprise then, that workers in the Oil and Gas sector are less confident about their futures now than in previous years. The drive towards decarbonisation also explains the increased confidence of those working in renewables and mining, where specialised 'green' metals for use in electric vehicle batteries are in high demand.

This year, when asked which sectors they'd pursue employment opportunities in, those working in Oil and Gas said renewables (56%), compared to 38.8% last year, whereas 31% said construction, compared to 28.8% last year.

CONSIDERING LEAVING THE ENERGY INDUSTRY IN THE NEXT 5 YEARS



When asked if they are considering leaving the energy industry in the next 5 years, people in Oil and Gas were the most likely to say yes (44% on average), followed by 42% of those in mining, 42% of those in power, 42% in renewables, and 39% of those in nuclear.

Industry Recruitment Trends

Industry trends explains the findings around the challenges of recruitment across the energy industry. What the future holds in regards to the change workers would like to see in order to retain them including: Recruitment challenges, employee outlook and salary and benefits.

Key Insights:

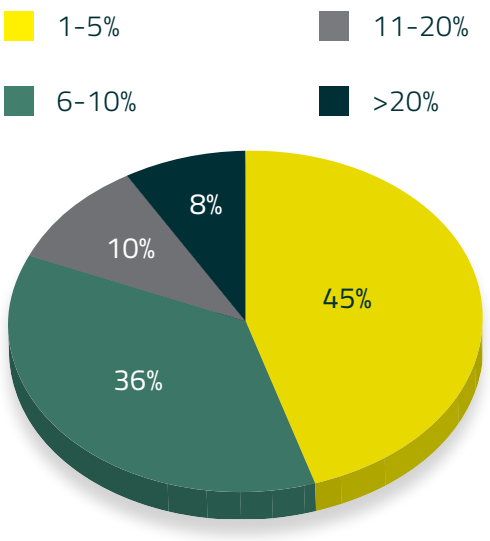
- 82% of recruiters say that 1 in 10 of their open positions have been unfilled for more than 3 months, with Drilling & Well Delivery (14%), and Geoscience (12%) being the most difficult roles to fill
- 10% of employers have had to pay retirees to come back to take unfilled job openings due to skills shortages
- 43% of workers want to leave the energy industry all together within the next 5 years, with top-performing employees citing personal lifestyle changes (22%), low salary (22%), and poor safety training (10%) as the main reasons

Recruitment Challenges

Despite the energy sector bouncing back overall, hiring activities are creating recruitment stresses as applications per vacancies remain low. Our survey reveals that 82% of recruiters say that 1 in 10 of their open positions have been unfilled for more than 3 months.

The top energy job roles with unfilled positions are Drilling & Well Delivery (14%), followed by Geoscience (12%). Roles that are proving equally difficult to fill are Operations, Maintenance, and Production (11%), Construction, Subsea, and Pipelines (11%), and Health, Safety and Environment (11%).

PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



PERCENTAGE OF UNFILLED POSITIONS

	1-5%	6-10%	11-20%	>20%
Overall	45%	36%	10%	8%
North America	53%	36%	8%	3%
South America	49%	43%	6%	3%
Europe	56%	27%	7%	10%
Africa	65%	14%	6%	16%
Middle East	51%	29%	11%	9%
CIS	22%	33%	33%	11%
Asia	46%	28%	13%	14%
Australasia	60%	25%	5%	10%

As an ageing industry, it's understandable that upstream roles are proving the most challenging to fill. As more workers reach retirement age, their skills and expertise are at risk of being lost unless companies can implement effective succession plans. In fact, our survey finds that 10% of employers have had to pay retirees to come back to take unfilled job openings due to the skills shortage. This is particularly true in North America (13%).

In order to attract new talent, companies are having to offer higher salaries, which of course, has an impact on companies bottom-lines. To engage the next generation of upstream workers, companies should also focus on creating an attractive benefits package that offers what young people are looking for in a role. Flexible working, bonus schemes, and transport expenses for example, are all appealing incentives to younger workers.

Employee Outlook

When we consider the challenges recruiters are currently facing in securing a talent pipeline, the future looks increasingly difficult as workers change their priorities. Our survey finds that 43% of workers want to leave the energy industry all together within the next 5 years. Equally concerning is the statistic that top-performing employees, who have been promoted twice or more in the last 12 months, are 28% more likely to be planning an exit from the energy industry within 5 years.

Looking deeper into why top-performing employees are leaving the energy industry, we find the top reason is personal lifestyle changes (22%), followed by low salary (22%), and poor safety training (20%).

Breaking these statistics down by age, we find that young workers aged between 25 and 29 are 25% more likely than older workers to want to leave the energy industry. The top reasons given by younger workers are personal lifestyle changes (25%), low salary (21%), and lack of good benefits (20%).

> **Young candidates welcome internship opportunities, which companies can create through developing stronger partnerships with specialist colleges and universities globally. Companies that create engaging content for social media can develop a more powerful image that demonstrates their values. Embracing social media and online career platforms can improve engagement with new talent and help plug skills gaps.**
>
> — Gareth Ford, Business Development Manager - Oilandgasjobsearch.com

With the Oil and Gas sector struggling to retain younger workers, it's going to be important for companies operating in this sector to update their branding to align with the values of the next generation.

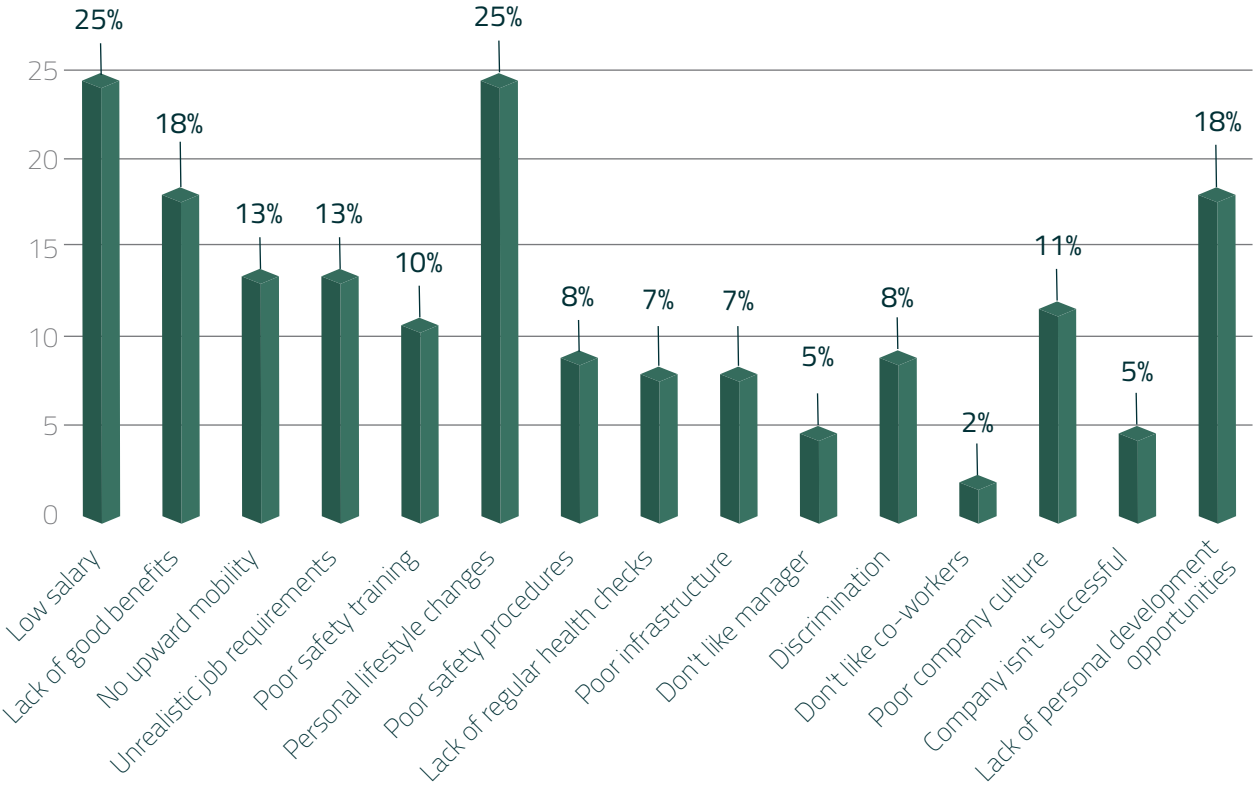
Adopting a structured salary scheme can also encourage younger workers to stay in their current role, as they'll have a clear progression path to aspire to.

Our findings show that those working in renewables are the most likely to have shifted into a new sector within the past 12 months (51%). This is followed by mining (41%), nuclear and power (29%), and Oil and Gas (24%).

> **The younger generation's interest in the mining sector could increase in popularity despite the reputation the industry sometimes experiences. Autonomous mining innovations are heavily aligned with digital transformation/transition and emerging technologies. Improved safety standards, combined with the implementation of cleaner and greener innovations, will create more opportunities for young people searching for a career where they'll be able to contribute to a positive future. To echo the current buzz in the industry - it's not all hi-vis; it's high-tech.**
>
> — Tania Sinibaldi, Managing Director Australasia - Brunel

With more workers gravitating towards the renewables sector, it's likely that the industry will continue to see an exit from those in traditional sectors. The shift towards renewables and mining presents an opportunity for the industry as a whole, as innovation and pioneering projects create job opportunities.

REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



*Statistic details on page 74

Salaries and Benefits

SALARY TABLE BY SECTOR

	AVG SALARY BY SECTOR	AVG CONTRACTOR DAILY RATE BY SECTOR
Oil and Gas Upstream	$70,923	$644
Oil and Gas Midstream	$65,844	$641
Oil and Gas - Downstream	$64,986	$622
Renewables Biogas	$80,156	$851
Renewables Solar	$82,016	$814
Renewables Hydropower/Tidal	$77,343	$895
Renewables Wind	$88,735	$864
Renewables Design	$81,150	$919
Mining Concept	$82,997	$1,033
Mining Exploration	$79,418	$896
Mining Discovery	$81,799	$1,141
Mining Development	$83,424	$891
Mining Construction	$74,038	$717
Mining Production	$67,464	$643
Mining Mine Closure and Rehab	$79,255	$889
Mining Monitoring and Evaluation	$69,581	$845
Mining Design	$73,119	$738
Power Nuclear	$62,460	$537

The higher salaries offered by the renewables and mining sectors are making roles in these areas more appealing, which adds to the pressure faced by recruiters in the oil and gas sector.

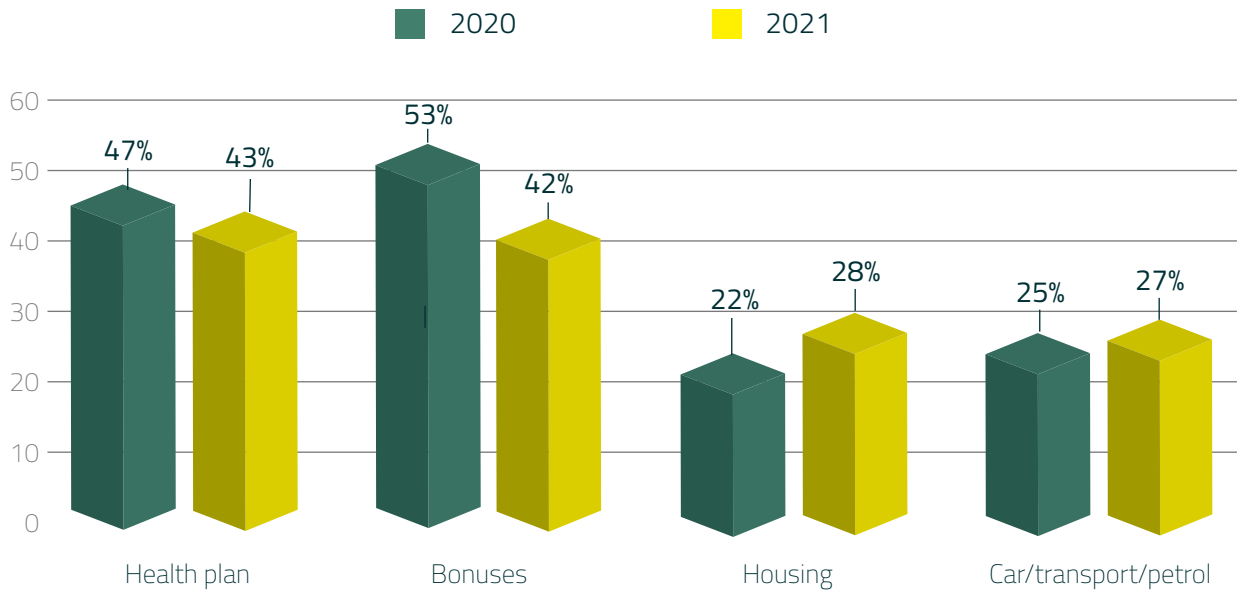
In terms of compensation packages, the most common incentives offered by companies in the energy sector is a health plan (43%), followed by a bonus (42%), housing (28%), a car, transport, and fuel (27%), and a meal allowance (26%).

By contrast, last year, the most common company benefit was a bonus (53%), followed by a health plan (47%), a car, transport, and fuel (25%), housing (22%), and overtime compensation (20%).

The difference in compensation packages from this year to last is a reflection of the current climate. With the industry facing several challenges at once, and activities having slowed down due to lockdowns, less bonuses are being awarded this year and health is being prioritised.

Similarly, there's less of a focus on transport as many sectors of the industry still has people working from home. Overtime is no longer a top incentive as we see the industry shift towards encourageing a healthy work-life balance.

MOST COMMON BENEFITS INCLUDED IN WORKERS COMPENSATION PACKAGE



Re-defining the Industry

Redefining the industry includes further topics in addition to recruitment challenges that is potentially holding back the industry from attracting and retaining top talent. The survey results highlight areas that workers have expressed a desire to see an improvement moving forward. Including themes such as: Creating a diverse workforce, supporting the workforce and company benefits and incentives.

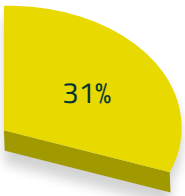
Key Insights

- 31% of energy workers say they have personally been the target of workplace discrimination, and 43% say they have witnessed discrimination directed at others
- 40% of energy workers lost a job due to COVID-19 in 2020 or 2021. The top jobs that were lost were within Equipment Supply, Mud Logging, Cost Engineering, Electrical Project Engineering, and Drilling and Well Delivery
- The most important non-compensation factors to top performers in the industry are career opportunities (41%), job security (41%), and training & development (38%)

Creating a Diverse Workforce

Diversity and inclusion is at the top of the agenda in many industries, and the energy sector is no different. To attract the new generation of workers, companies need to demonstrate their commitment to diversity, and do what they can to remove bias from their recruitment processes, internal promotions and career development.

HAVE YOU BEEN THE TARGET OF WORKPLACE DISCRIMINATION



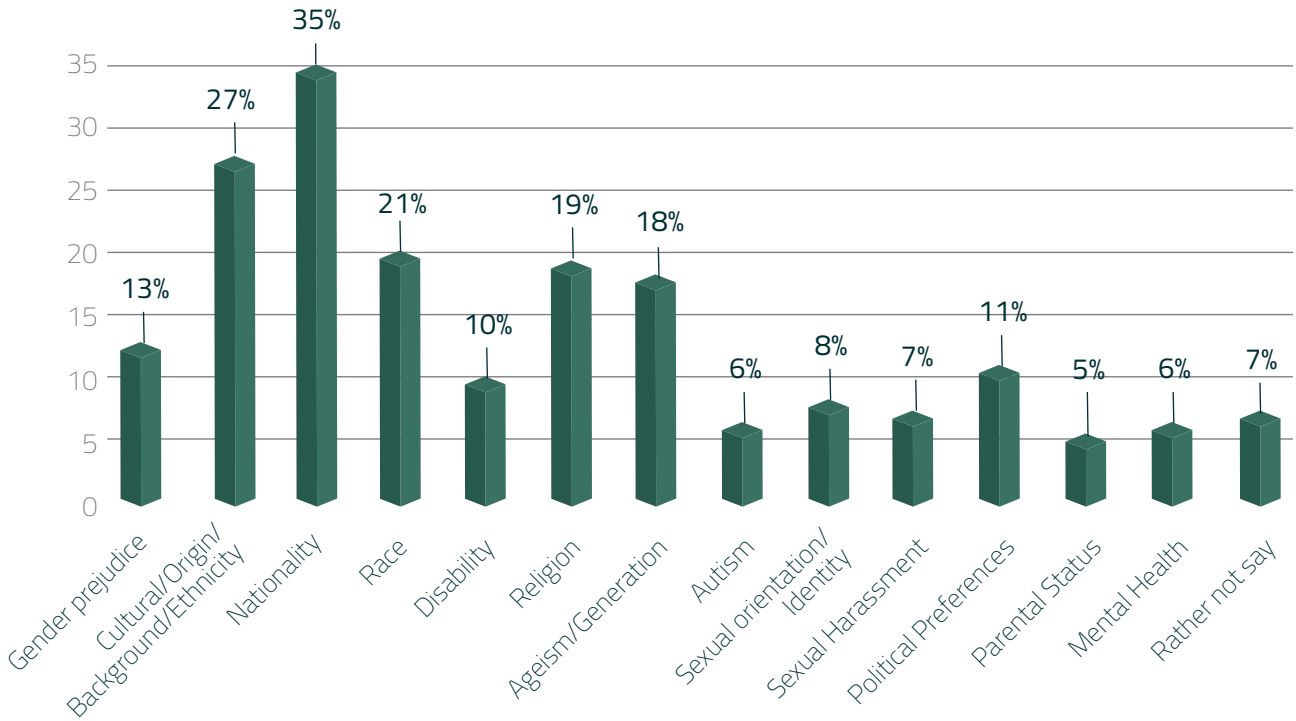
Our survey finds that 31% of energy workers say they have personally been the target of workplace discrimination, and 43% say they have witnessed discrimination directed at others.

Those most likely to have been the target of workplace discrimination are non-binary workers (86%), followed by women (42%), workers under the age of 30 (42%), workers in Australasia (30%), and those in the Middle East (27%).

The most common forms of workplace discrimination in the energy industry are nationality (35%), culture, origin, background, or ethnicity (27%), race (21%), religion (19%), and ageism (18%).

These worrying statistics show that more needs to be done to address diversity and inclusion in the energy industry overall. In addition to attracting a diverse talent pool, companies also need to provide employees with a platform to express their opinions and raise issues that impact their working life.

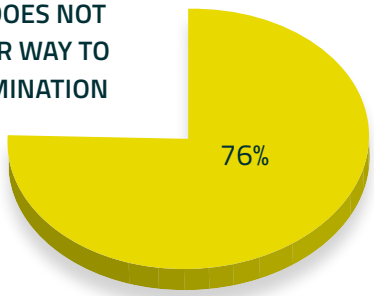
MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



*Statistic details on page 74

With 76% of energy workers saying their company doesn't provide a clear way to report discrimination, employers should provide a clear process for doing so that aligns with their DE&I policy.

THE COMPANY DOES NOT PROVICE A CLEAR WAY TO REPORT DISCRIMINATION



Developing clear policies, embracing skills-based recruitment, hiring for culture add, and appointing a diversity focal point are all practical steps employers can take to create a more inclusive workplace.

Our survey finds that 8% of employees are considering leaving the energy industry due to discrimination. In fact, more energy workers are considering leaving the industry because of discrimination than because their company isn't successful.

"Positive diversity in the workplace creates more innovation and production. We know that the energy sector needs to recruit aggressively in the next decade to enable its workforce to keep pace with the energy transition. D&I needs to be at the top of the agenda for companies to foster a culture of inclusivity, and inspire a wider audience to join the industry from the start.

— Beth Bowen, President – The Americas - Brunel

Supporting the Workforce

Employee support is one of the most important factors in employee retention. Workers who feel supported in their roles are more likely to remain loyal to a company in the future. Our survey finds that 40% of energy workers lost a job due to COVID-19 in 2020 or 2021. Those that lost their jobs over this period were most commonly working in Equipment Supply (69%), Mud Logging (62%), Estimating, or Cost Engineering (54%), Electrical Project Engineering (52%), and Drilling and Well Delivery (49%).

When we further analyse the data on job losses by region, we find that the Middle East has been the hardest hit, with 40% of energy jobs lost due to the pandemic. This is followed by Africa (39%), Asia (36%), the Commonwealth of Independent States (33%), North America (34%), Central and South America (34%), Europe (27%), and Australasia (24%).

Of those energy workers who lost a job due to COVID-19 in 2021, 59% received no assistance, compared to 44% last year.

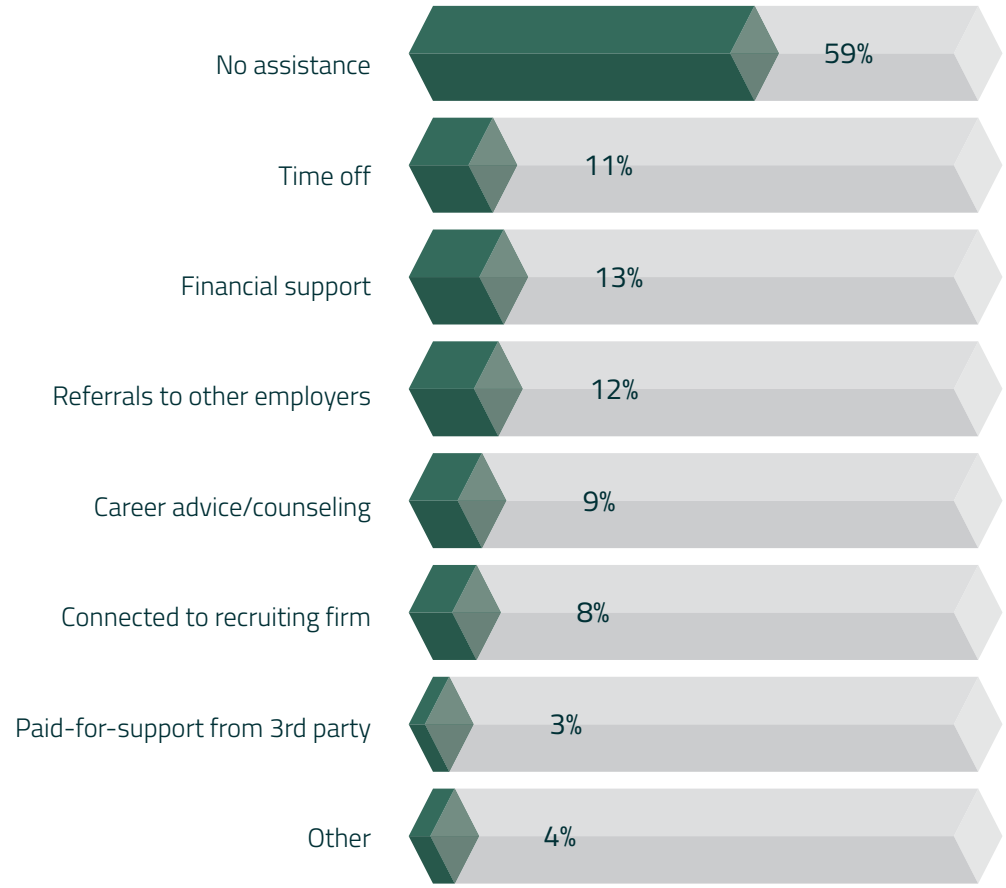
However, post-COVID, employers are now trying to hire the same workers back to fill their skills gaps.

The most common form of support for workers who did receive assistance during COVID-19 was time off (11%), followed by financial support (13%), referrals to other employers (12%), career advice or counselling (9%), connections to recruitment companies (8%), and paid-for-support from third parties (3%).

By comparison, last year the most common form of support was financial (6.9%), followed by connections to recruitment companies (5.2%), career advice or counselling (4.7%), referrals to other employers (4.4%), and paid-for-support from third parties (1.2%).

It's encourageing to see how employers' priorities have shifted towards health and wellbeing over the last year. Companies that provide counselling services and paid time off demonstrate to workers that they're invested in their future at the company.

ASSISTANCE RECEIVED IN ORDER TO HELP SECURE NEW EMPLOYMENT WHEN MADE REDUNDANT OR LAID-OFF DURING 2020 OR 2021*



*Statistic details on page 74

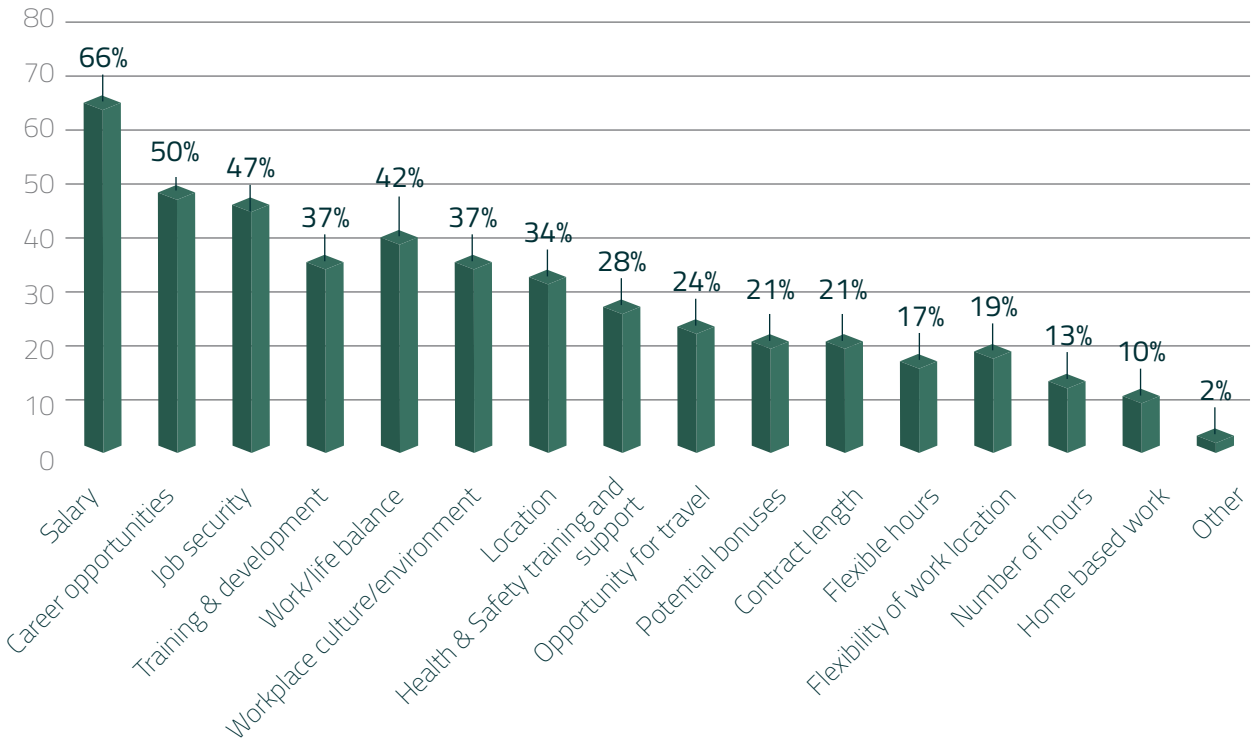
Company Benefits & Incentives

Salary remains the number one most important factor for workers when looking for a new role. Financial compensation aside, the most important factor in the candidate job search is career opportunities (50%), followed by job security (47%), work-life balance (42%), training and development (37%), and workplace culture (37%).

To attract candidates to a role, recruiters would do well to include examples of typical career progression paths in recruitment plans. When combined with real-life case studies of current employees, candidates are better able to envision a future with a company and more likely to make an application. Likewise, highlighting flexible working opportunities, and training and development programmes can help increase application rates.

The most important non-compensation factors to top performers are career opportunities (41%), job security (41%), and training & development (38%). When asked why they'd want to leave the industry in the next 5 years, the top answers given by top performers were low salaries, lack of good benefits and personal lifestyle changes.

WHAT IS MOST IMPORTANT TO WORKERS WHEN CONSIDERING A NEW ROLE*



*Statistic details on page 74

Regional Highlights

Regional highlights demonstrates the core findings of the survey per region.

Key Insights

- North America
- South America
- Europe
- Africa
- Middle East
- Asia
- Australasia

North America

As with most regions, COVID-19 created uncertainty for the North American power sector. The North American Electric Reliability Corp. (NERC) is currently facing the challenge of recruiting a critical workforce to operate and maintain the bulk power system (BPS). The region has also been impacted by ongoing supply chain issues that have had a knock-on effect in the form of lower commodity prices, reduced access to credit, and construction delays, to name a few.

In renewables, North America is a global leader in solar PV. At the height of the pandemic, several renewable energy projects were delayed, however, equipment supplies and financing have now returned to near normal levels. In its mining sector, equipment supplies have experienced little impact due to COVID-19, as many mines continued operating with less staff.

Joe Biden's presidency has also had short-term impacts on North America with the suspension of new Oil and Gas leasing and drilling permits for federal land and water. In the long-term, the region will likely face more energy recruitment challenges following the cancellation of the Keystone XL pipeline.

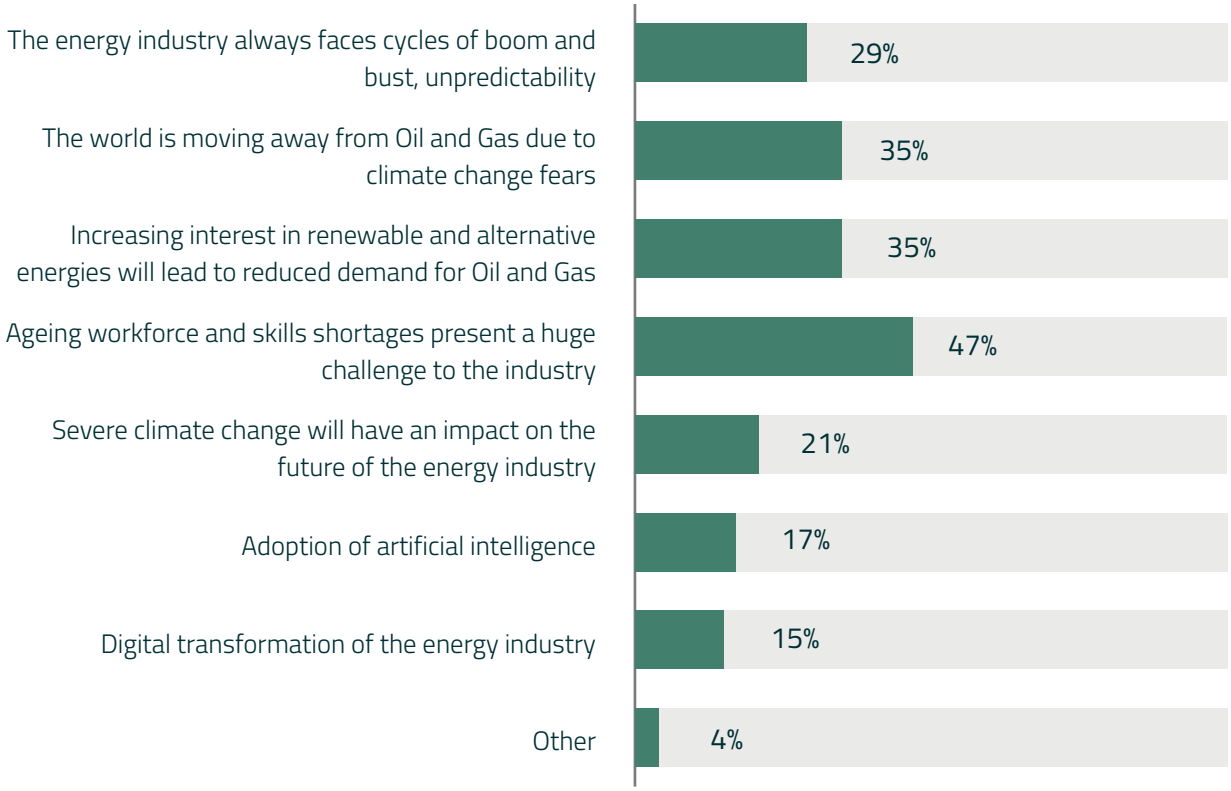
According to recruiters in North America, the biggest challenge that the industry is facing is the ageing workforce and associated skills shortages.

(47%). This is being overcome by training and development (41%) and partnering with colleges and universities (39%).

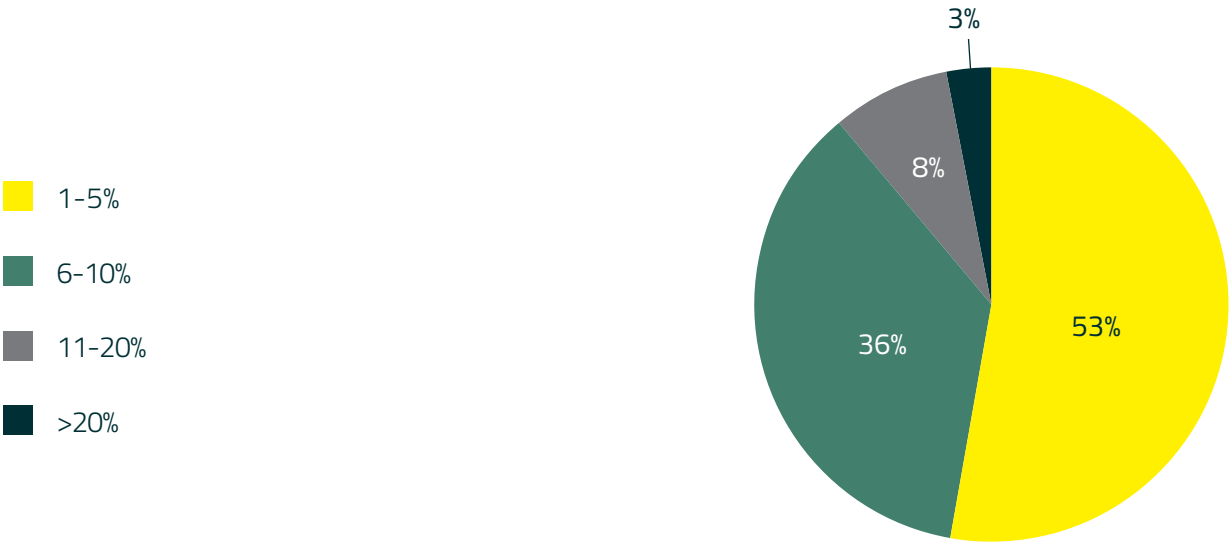
In terms of outlook, 40% of energy workers said they're considering leaving the industry within the next 5 years, and a further 24% don't know whether they'll stay or leave at this stage. The top reasons given for potentially leaving the energy industry in North America are personal lifestyle changes (30%), lack of upward mobility (20%), and personal development opportunities (19%).

When surveyed about diversity and inclusion, 25% of workers said they have personally been the target of discrimination, compared to 31% globally, and 44% have witnessed discrimination directed at others, compared to 43% globally. The most common form of discrimination was related to culture, origin, background, or ethnicity, while race was the most common answer for discrimination directed at others.

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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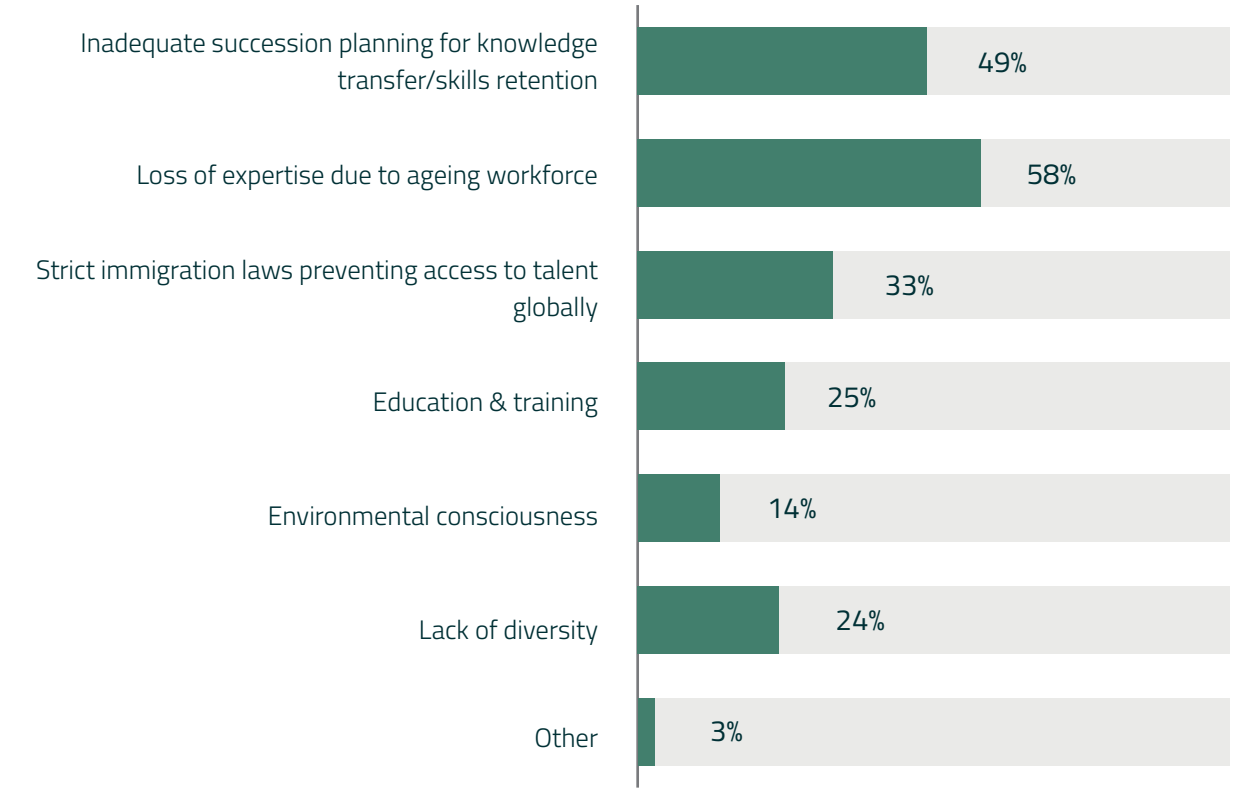
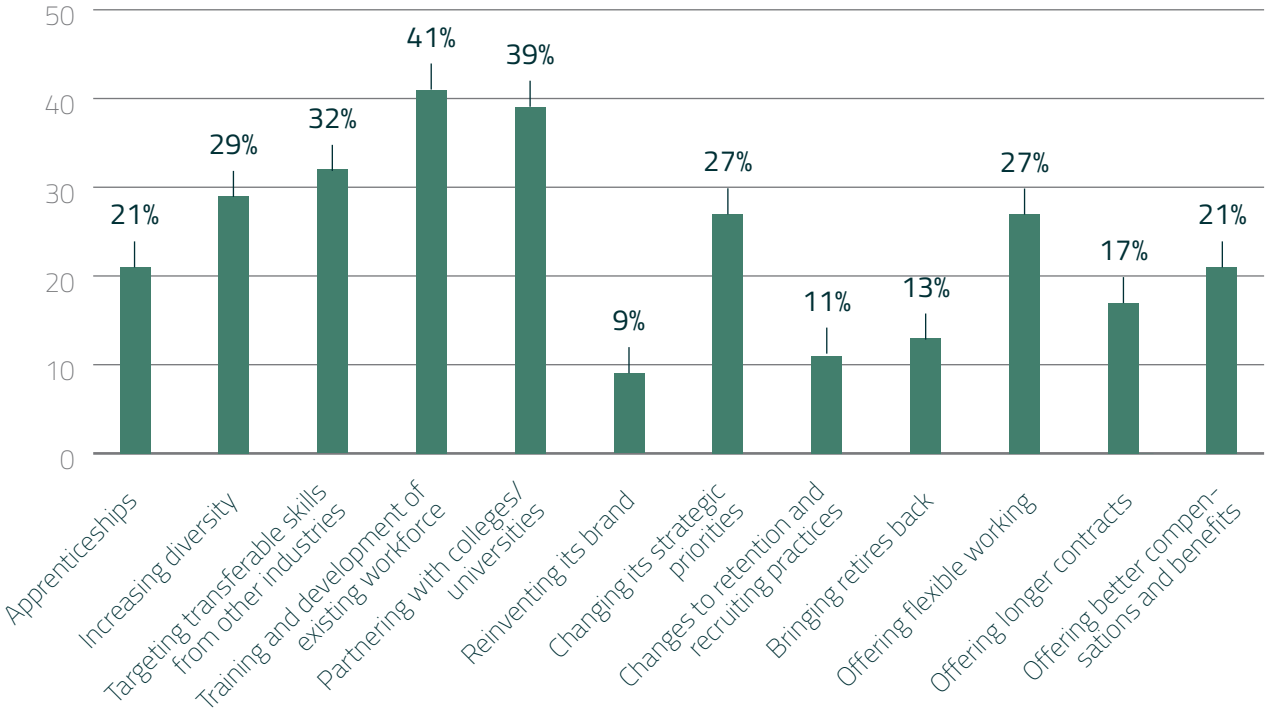
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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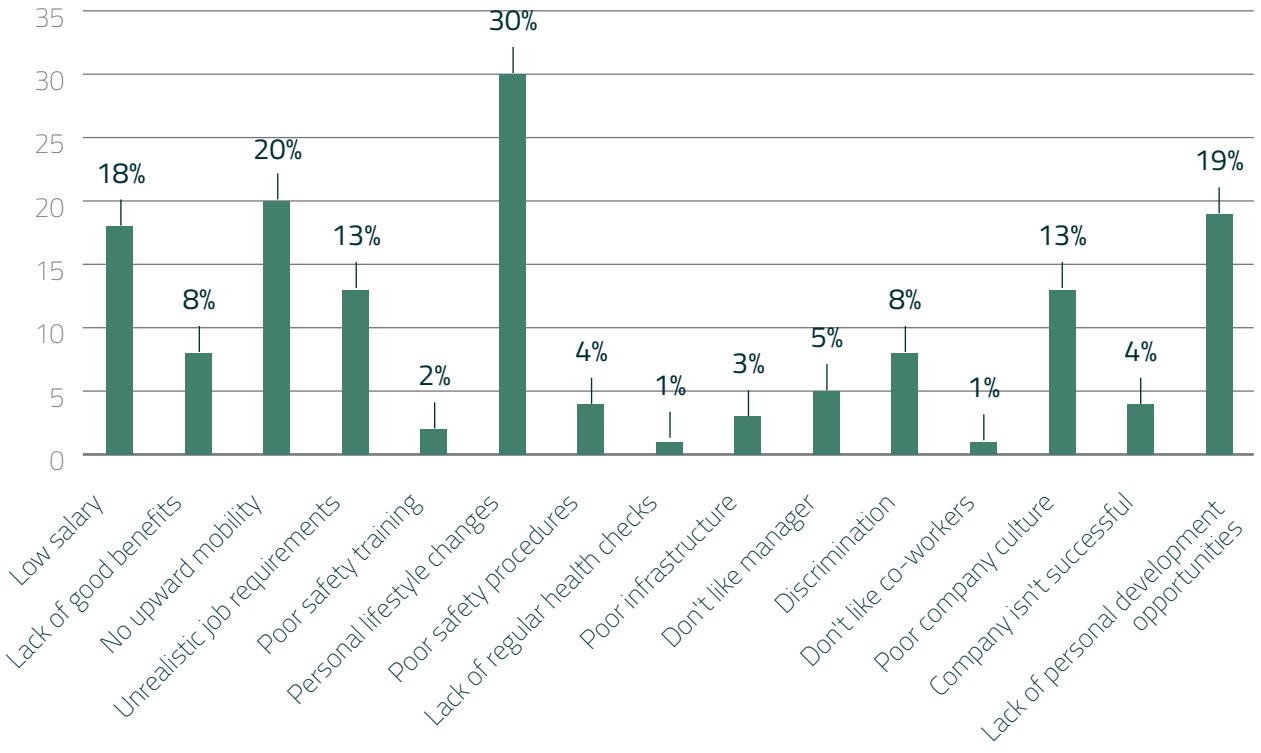
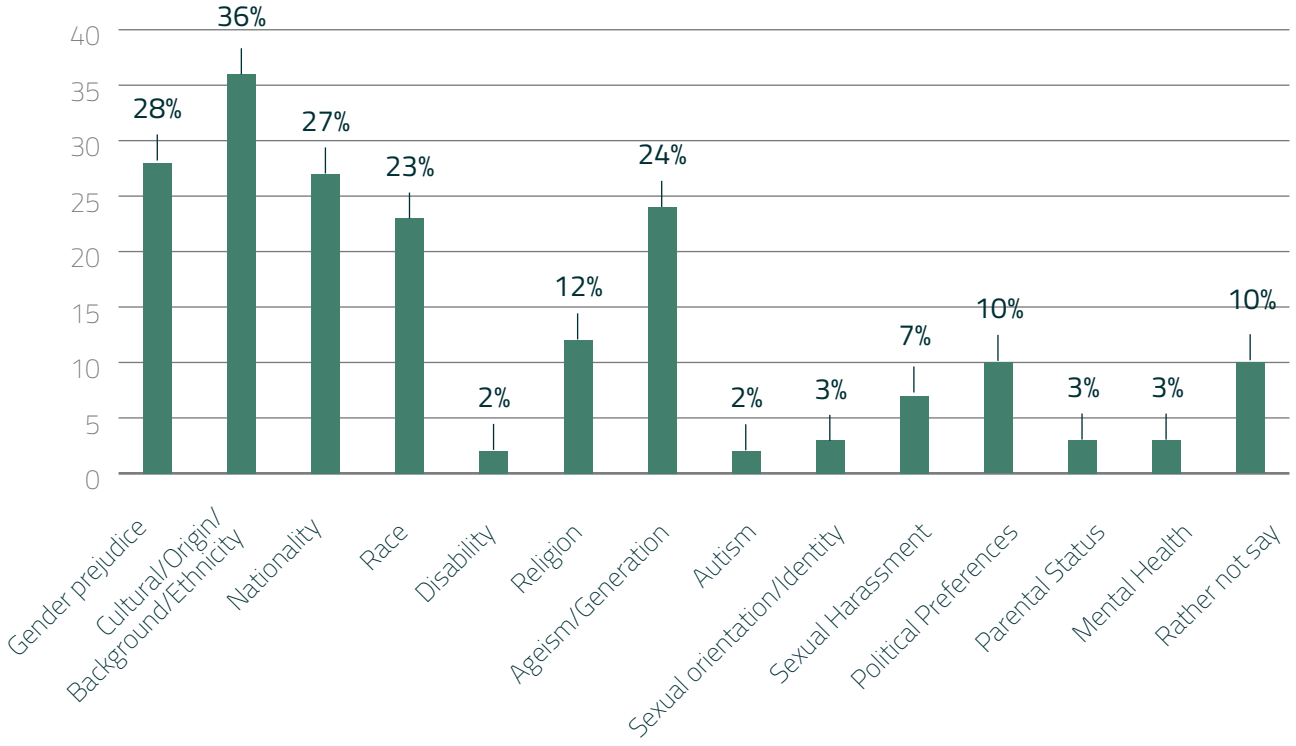
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



*Statistic details on page 74

South America

Climate change in general is having a negative impact on the South America region with Brazil in particular experiencing its worst drought in over a century. Extreme weather conditions are also affecting supply chains with many workers unable to physically travel to their jobs. In the long-term, these disruptions caused by climate change could lead to huge productivity losses for the region.

South America is one of the leading renewable energy-producing regions in the world. A large part of its renewable energy is generated by hydropower plants in countries such as Venezuela and Brazil. However, its importance is slowly declining in favour of non-hydro renewable energy sources.

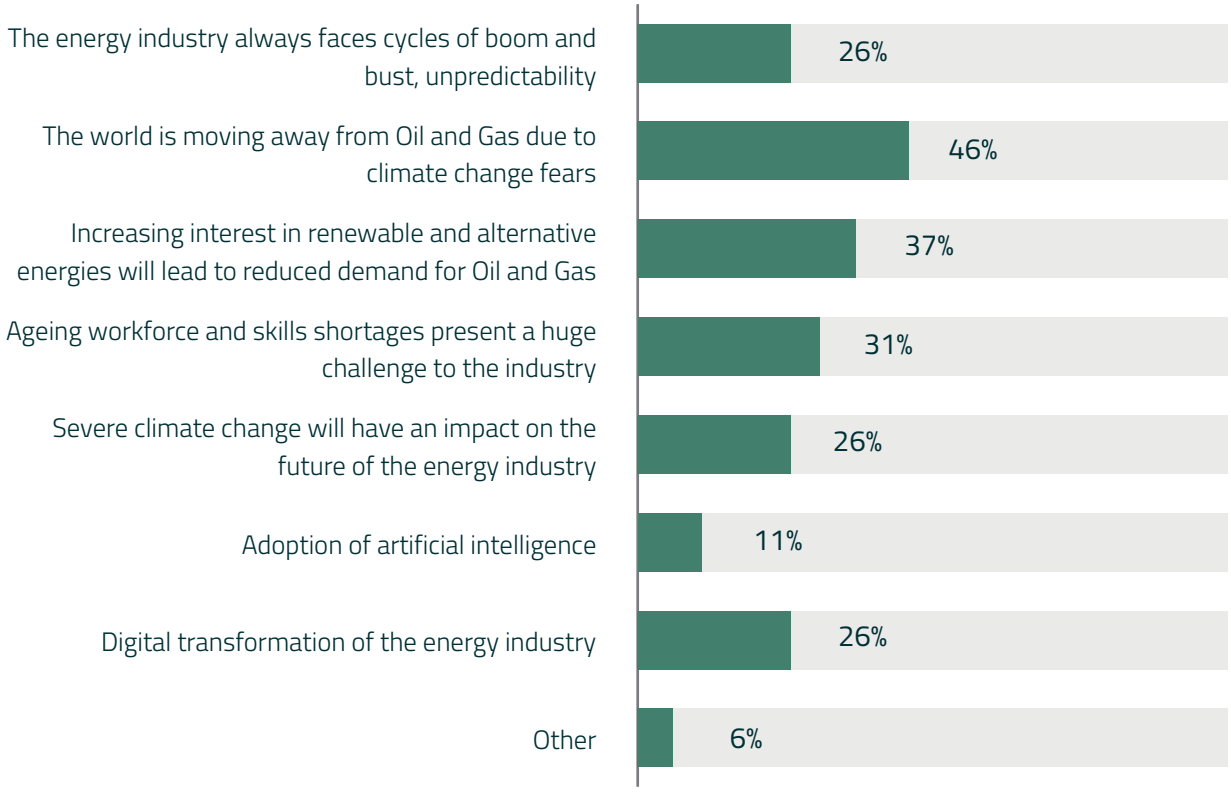
In its mining sector, South America has one of the world's largest reserves of metals. Despite slight disruptions to supply chains in the sector, mining continues to attract investors from around the globe.

In South America, the biggest challenge that the industry is facing is that the world is moving away from Oil and Gas due to climate change fears (46%). Recruiters say that the key cause of skills shortages is inadequate succession planning for knowledge transfer and skills retention (49%). To bridge the skills gap, employers are partnering with colleges and universities (51%), and focusing on training and developing their existing workforce (40%).

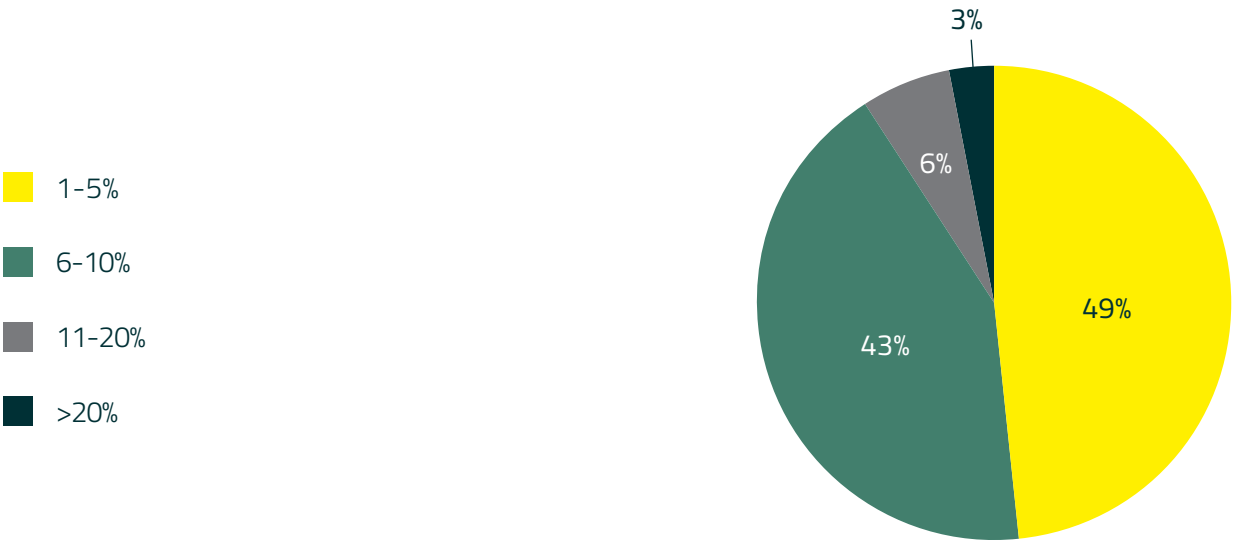
Retention rates are relatively high in South America compared to other regions, with 34% of energy workers considering exiting the industry within the next 5 years. By contrast, 36% feel more confident about their future in the industry and are not considering leaving the industry at this stage.

On an equally positive note, South America has the lowest percentage of workers who feel they've been the target of discrimination (21%), and only 30% say they've witnessed discrimination towards others. The most common form of discrimination is related to nationality, while culture, origin, background, or ethnicity was the most common reason for discrimination directed at others.

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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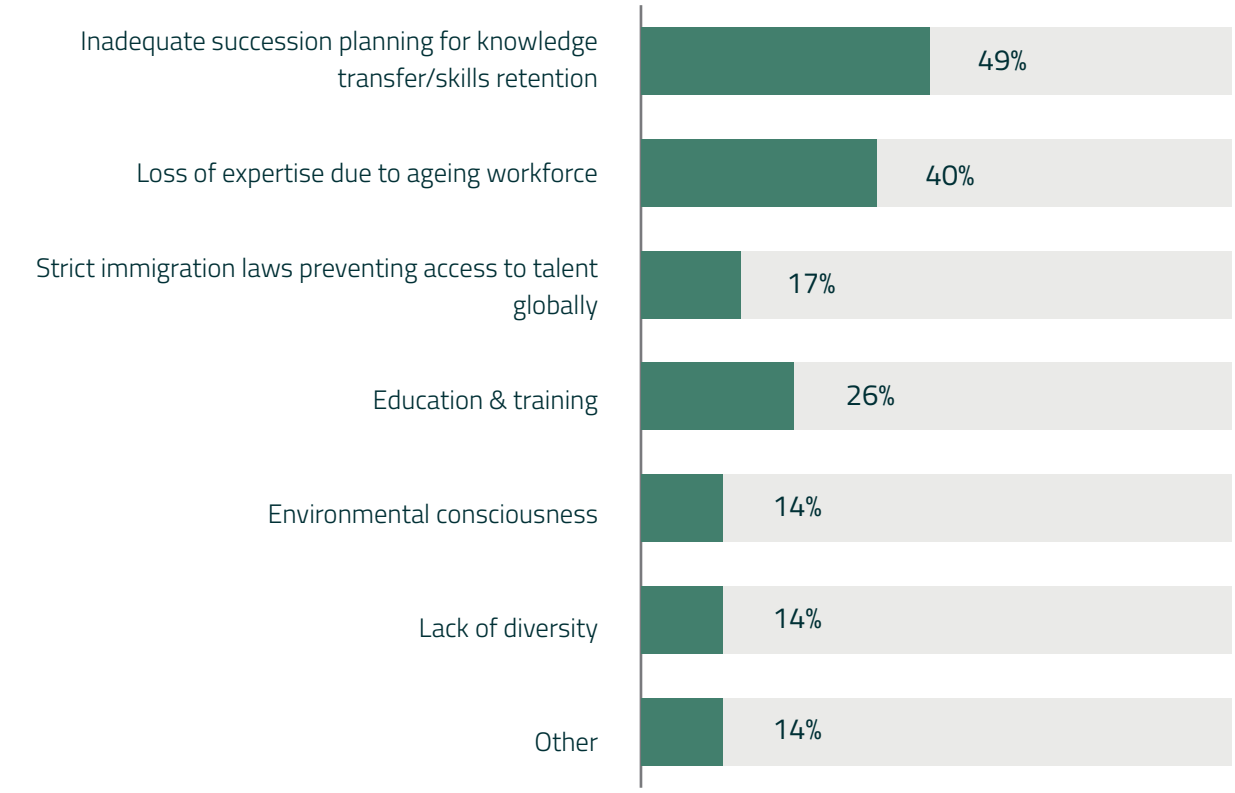
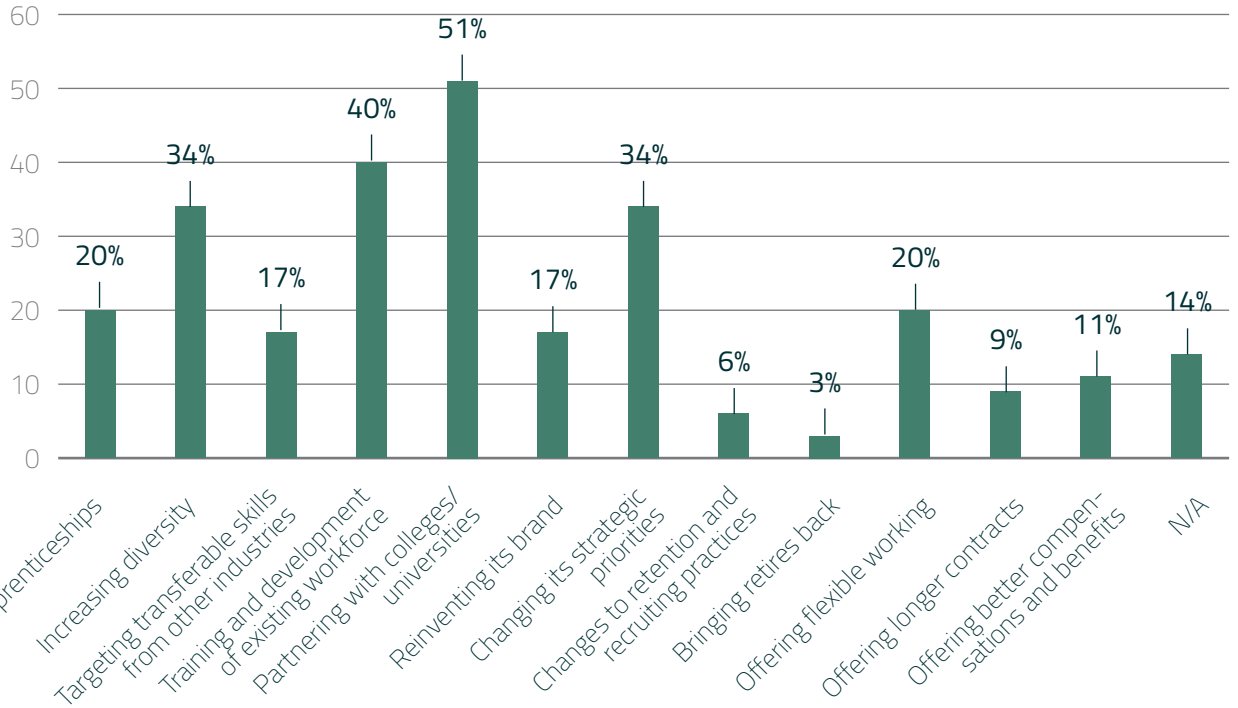
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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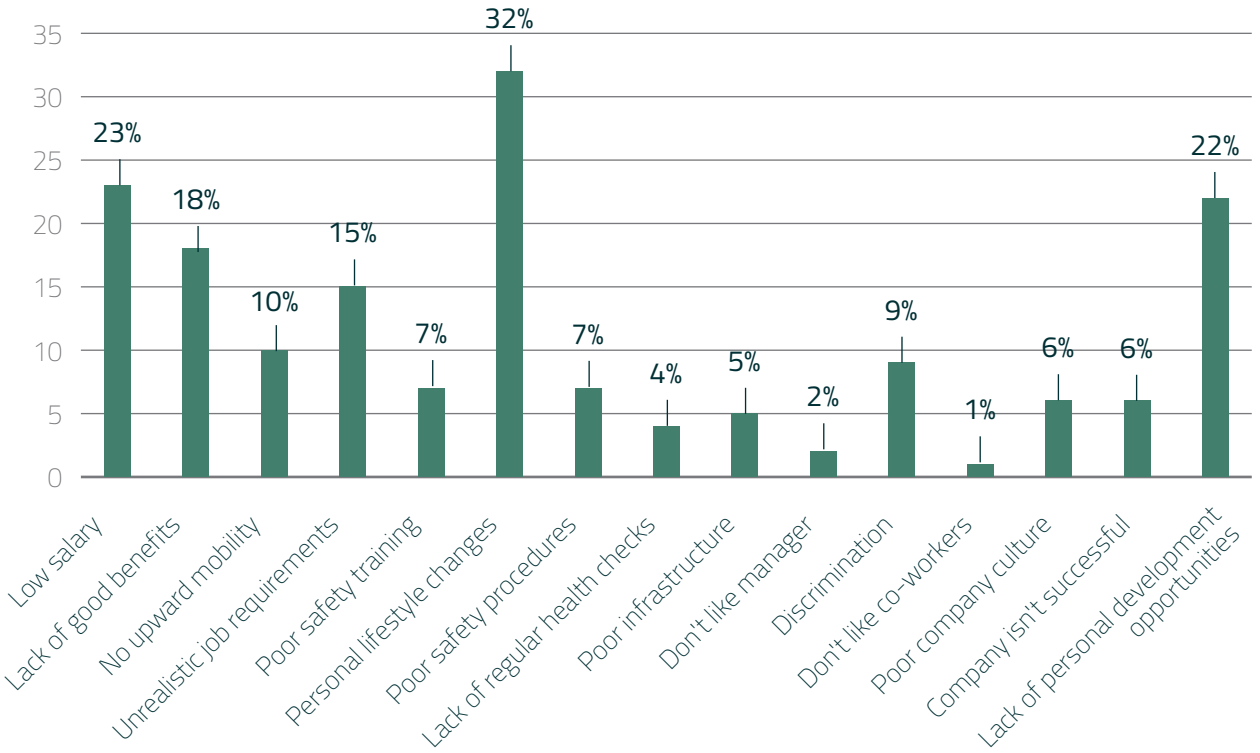
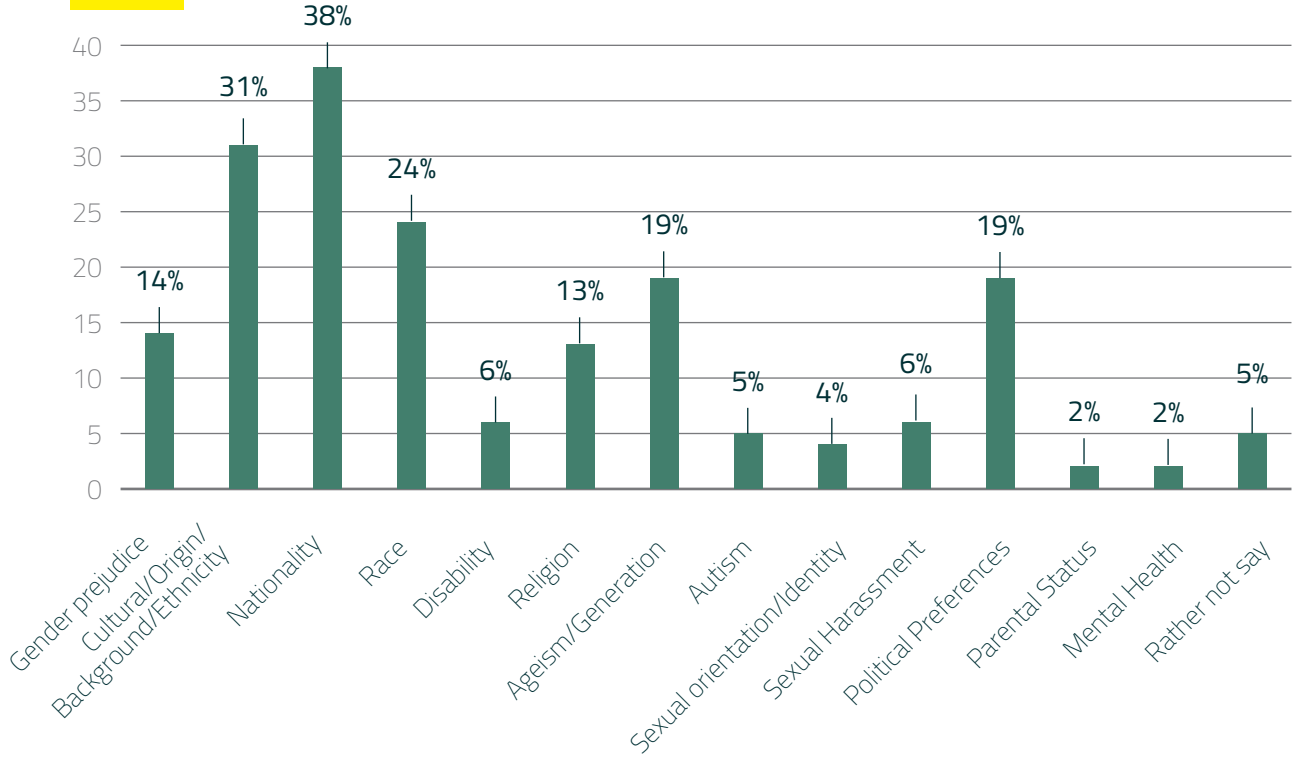
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



*Statistic details on page 74

Europe

Energy prices are at an all-time high in Europe due to increased demand and poor regional stockpiling. Coupled with the impact of climate change, where many countries have seen unprecedented heatwaves and prolonged winters, Europe is facing an energy crisis.

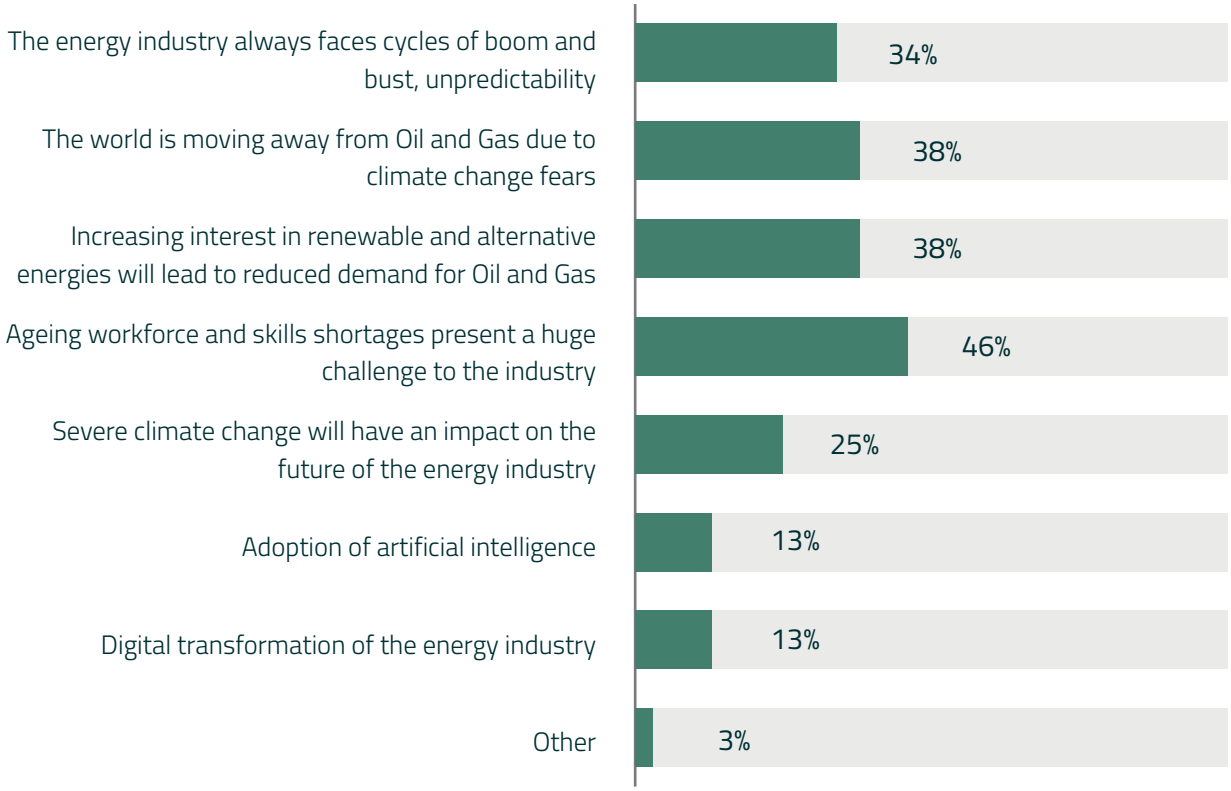
For more than two decades, Europe has been at the forefront of global renewable energy deployment. On a positive note, the region's renewables sector has been largely unaffected by COVID-19 with new investments having continued over the last couple of years.

In the mining sector, however, Europe has been impacted by supply chain issues, which coupled with rising costs, means the region has a somewhat weaker project pipeline than before the pandemic.
Recruiters report that in Europe, the biggest challenges facing the industry are the ageing workforce and associated skills shortages (46%). When asked for the main reason for skills shortages, education and training is cited as the key reason. To bridge the skills gap, employers are focusing on training and developing their existing workforce (51%).

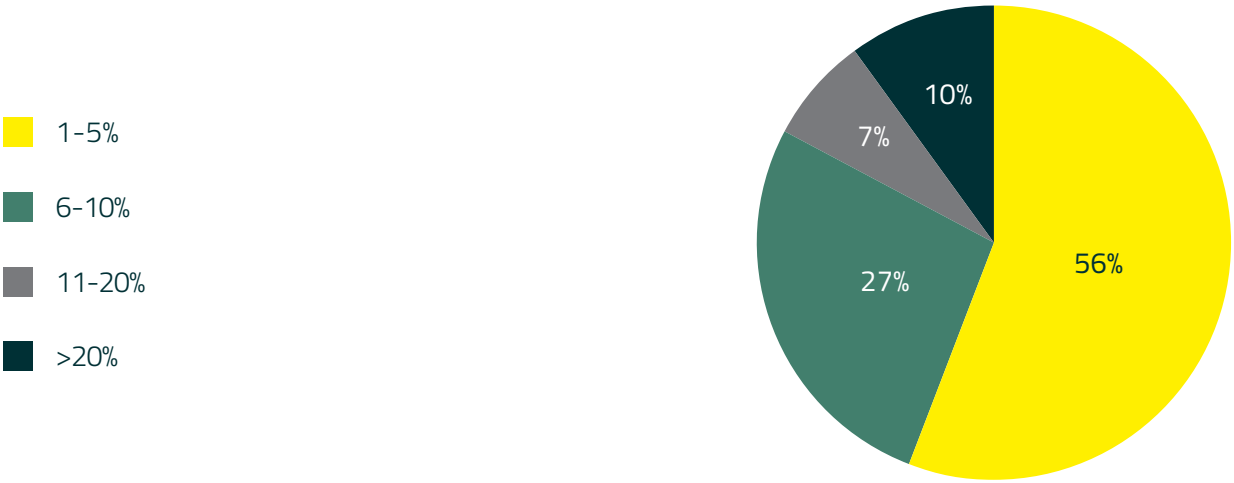
Looking to the future, 41% of energy workers say they're considering exiting the industry within the next 5 years, and a further 26% don't know whether they'll exit or stay. The main reasons given for leaving the sector include low salaries (27%) and personal lifestyle changes (24%).

When surveyed about diversity and inclusion, only 24% of workers said they have personally been the target of discrimination, compared to 31% globally, and 39% have witnessed discrimination directed at others, compared to 43% globally. The most common form of discrimination was nationality.

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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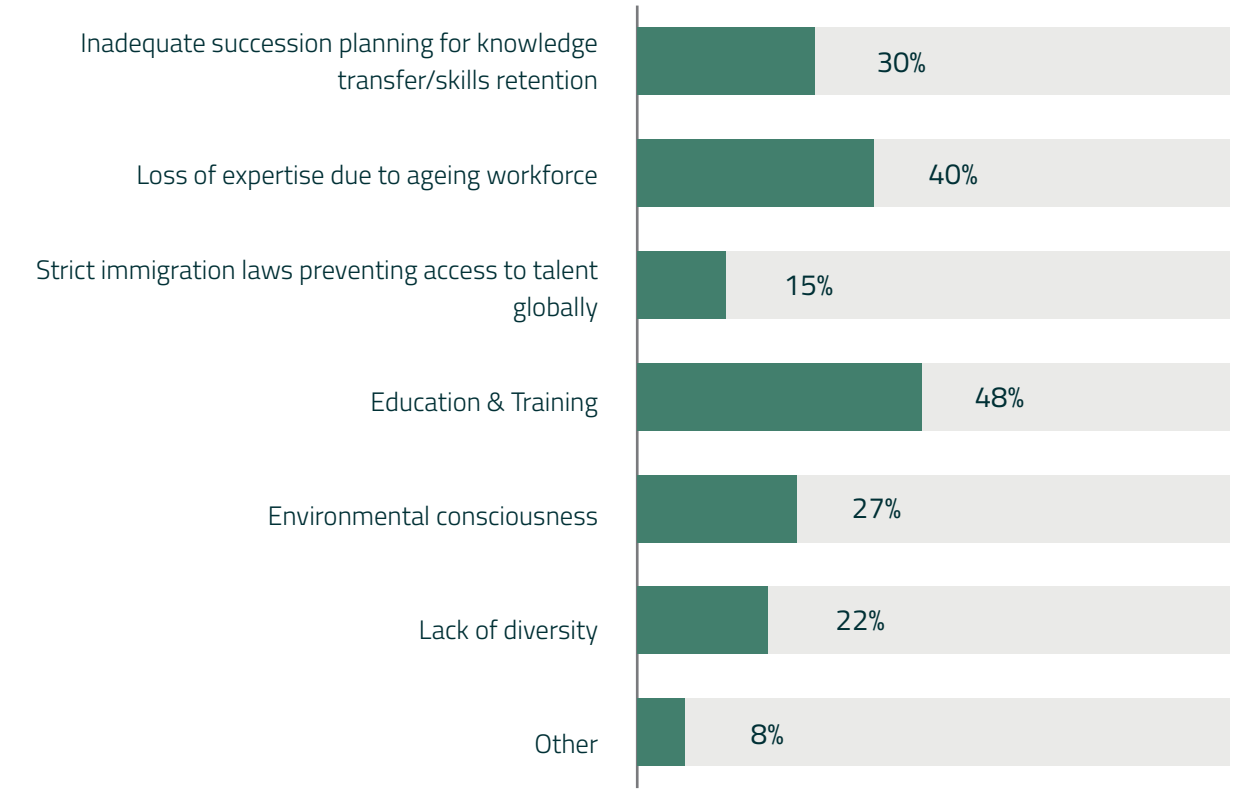
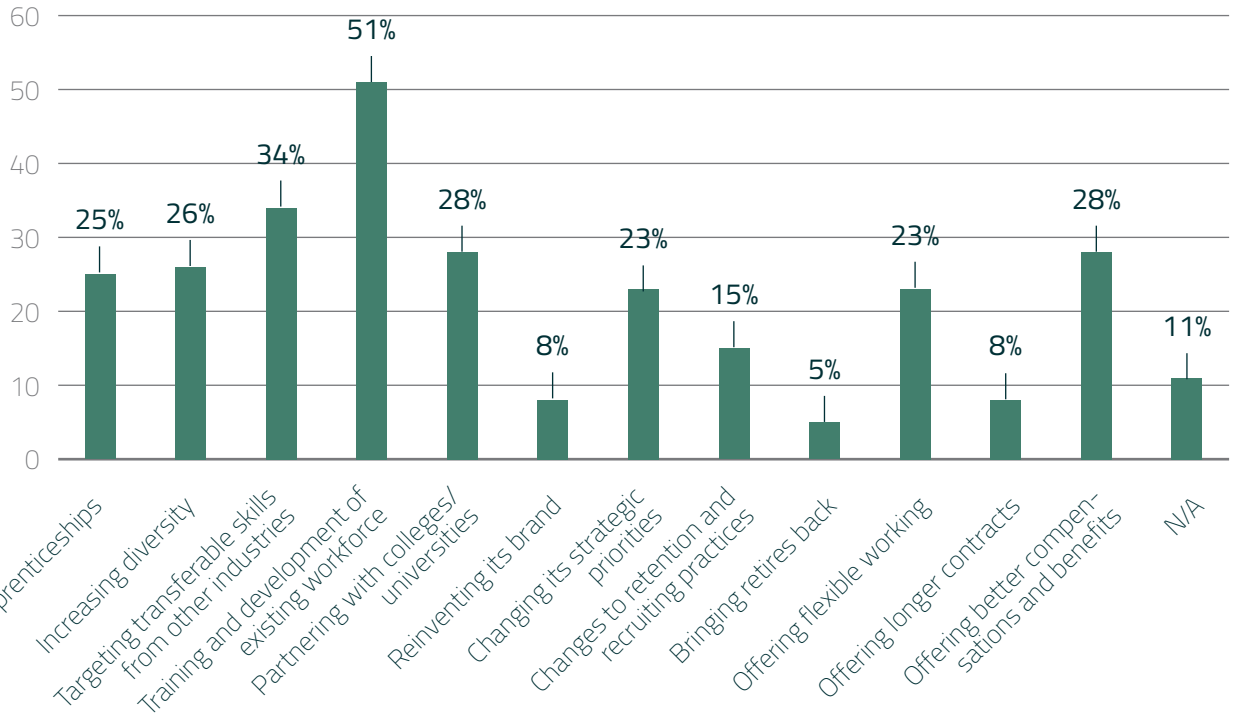
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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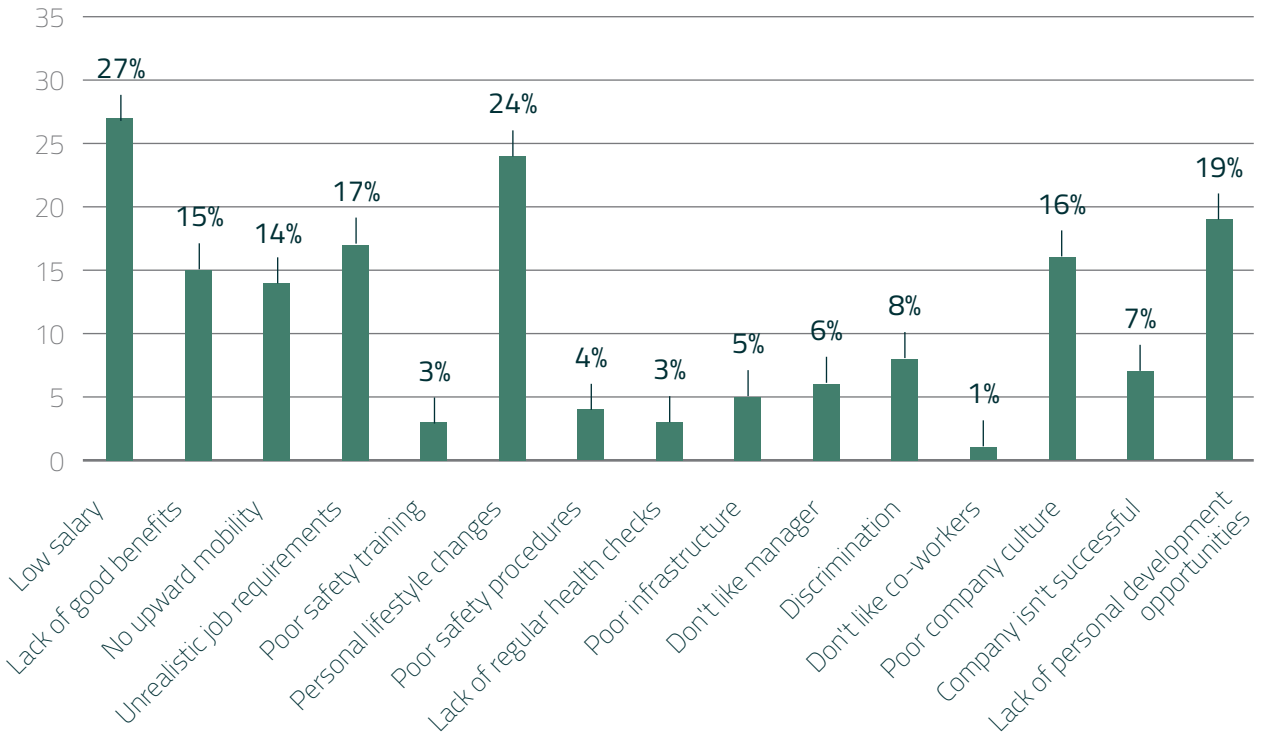
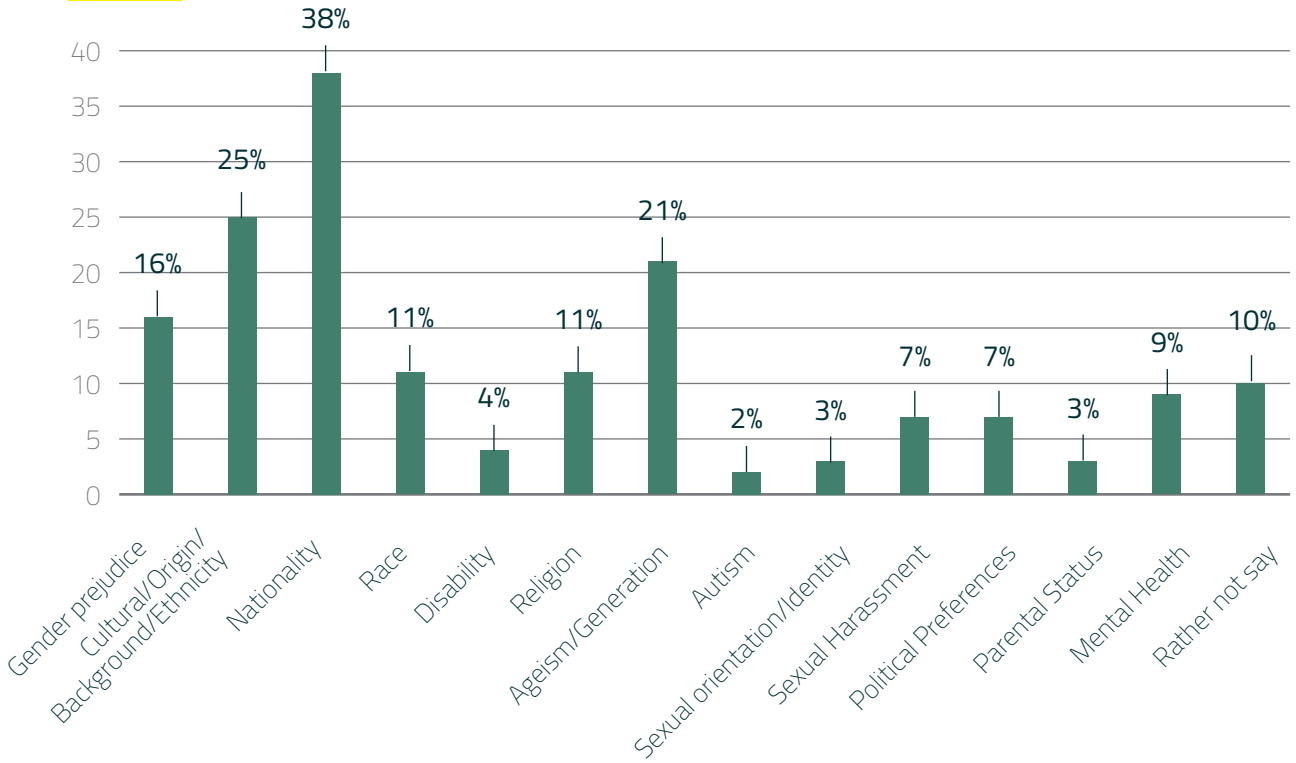
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



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Africa

Despite its fragile healthcare system, COVID-19 has had less of an impact in Africa than elsewhere due to its warm climate, younger population and the rapid response of community health programmes. However, the pandemic has highlighted the region's energy poverty and further exposed the weaknesses in its energy systems. The region has experienced supply chain issues, and coupled with a drop in the price of oil, has hit the economies of oil exporting countries like Egypt and Algeria the most.

In terms of renewables, pre-COVID, Africa was in a strong position to pursue renewables projects and the region's production saw significant growth leading up to the pandemic. Despite some supply chain issues, Africa's renewables sector looks set to continue to grow given the abundance of resources in the regions deserts and tropical climes. However, the region is currently experiencing an investment gap.

Africa's mining sector also looks set to grow post-COVID with the region's extractable reserves of metals and minerals, such as gold, diamond, iron ore, and cobalt.

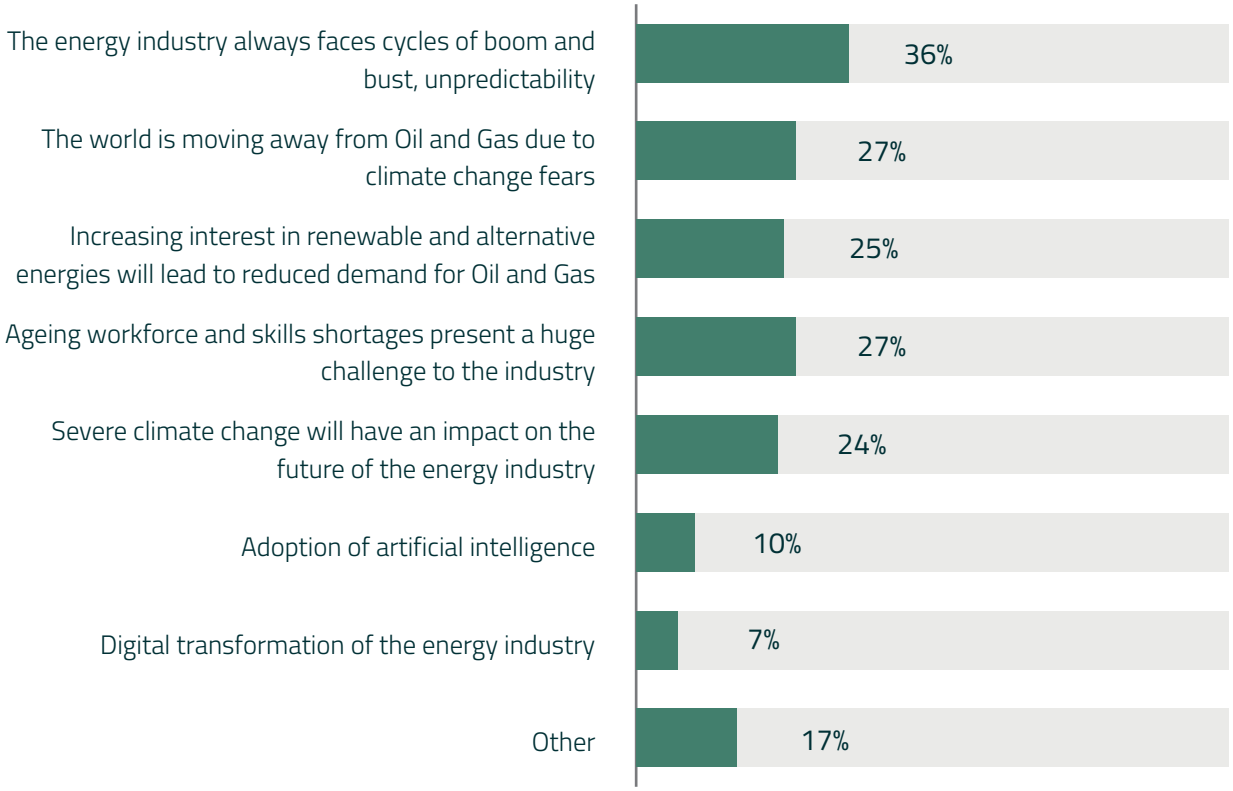
Recruiters in Africa say that the biggest challenge in energy is that the sector is constantly facing cycles of boom and bust, which leads to unpredictability (36%). The main reason for skills shortages in the region is a lack of succession planning (45%). To overcome the issue, recruiters are focusing on training and developing the existing workforce (52%).

Most workers see a positive future for themselves, with only 31% considering leaving the industry within the next 5 years (the lowest percentage globally). By contrast, 49% are definitely not considering leaving the industry at this stage.

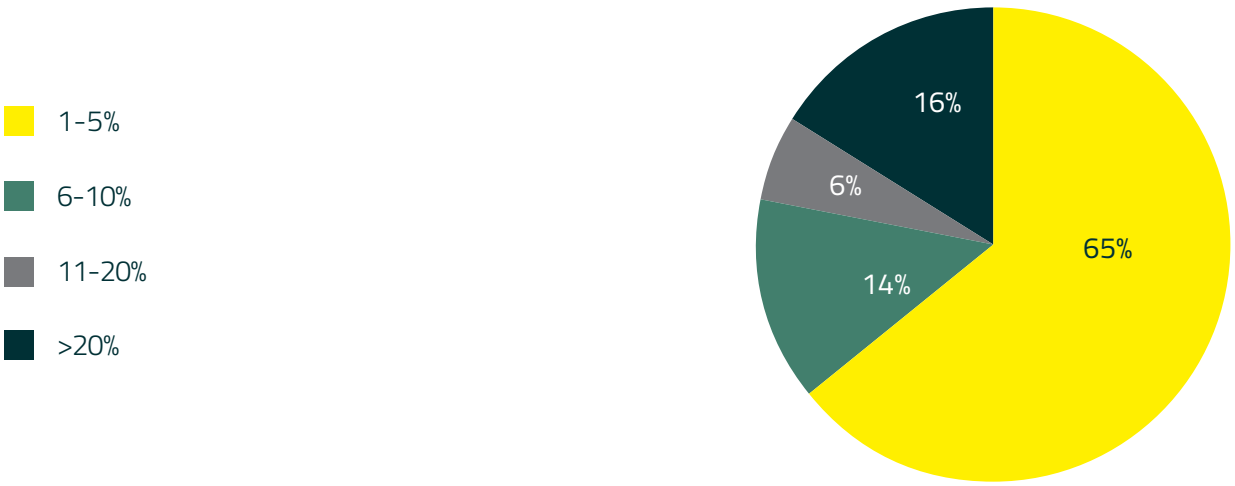
Discrimination levels are also relatively low, with only 23% of workers reporting having been the target of discrimination, compared to 31% globally. On the other hand, 40% have witnessed discrimination directed at others, compared to 43% globally. The most common form of discrimination is related to culture, origin, background, or ethnicity.

Even though discrimination seems to be less of an issue in Africa than in other regions, those who are planning to leave the industry say it's because of issues relating to discrimination (12%).

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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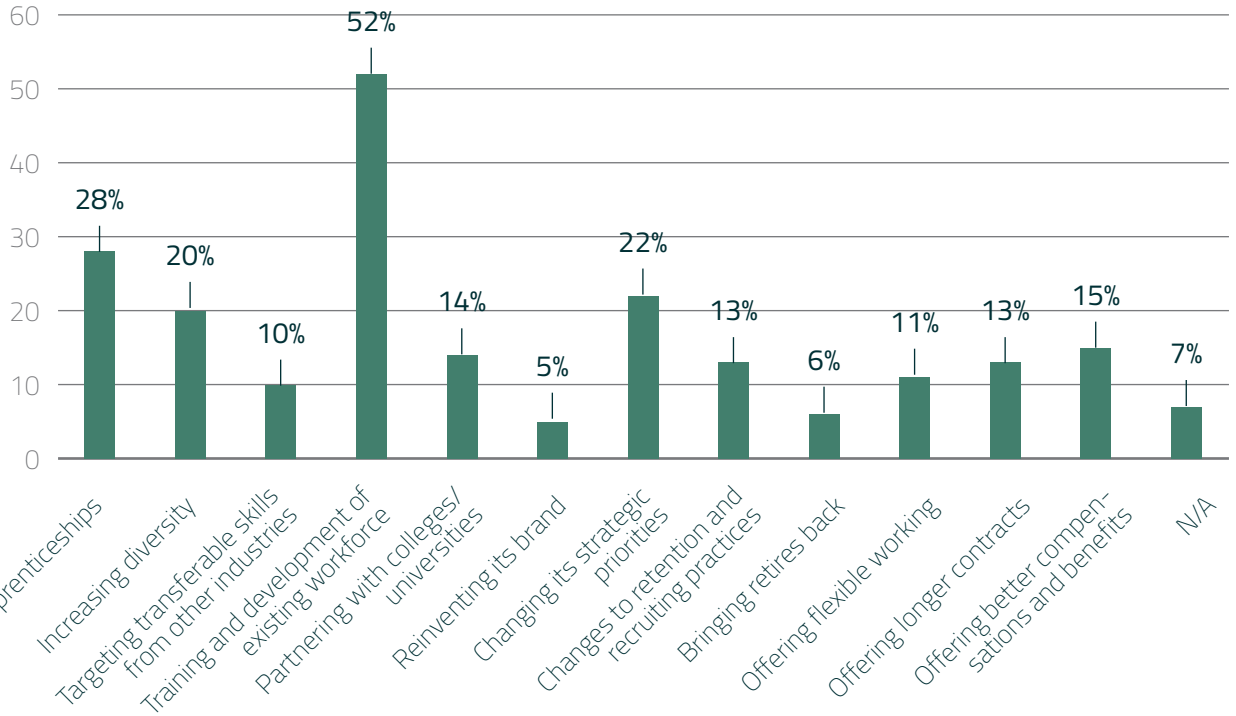
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*

WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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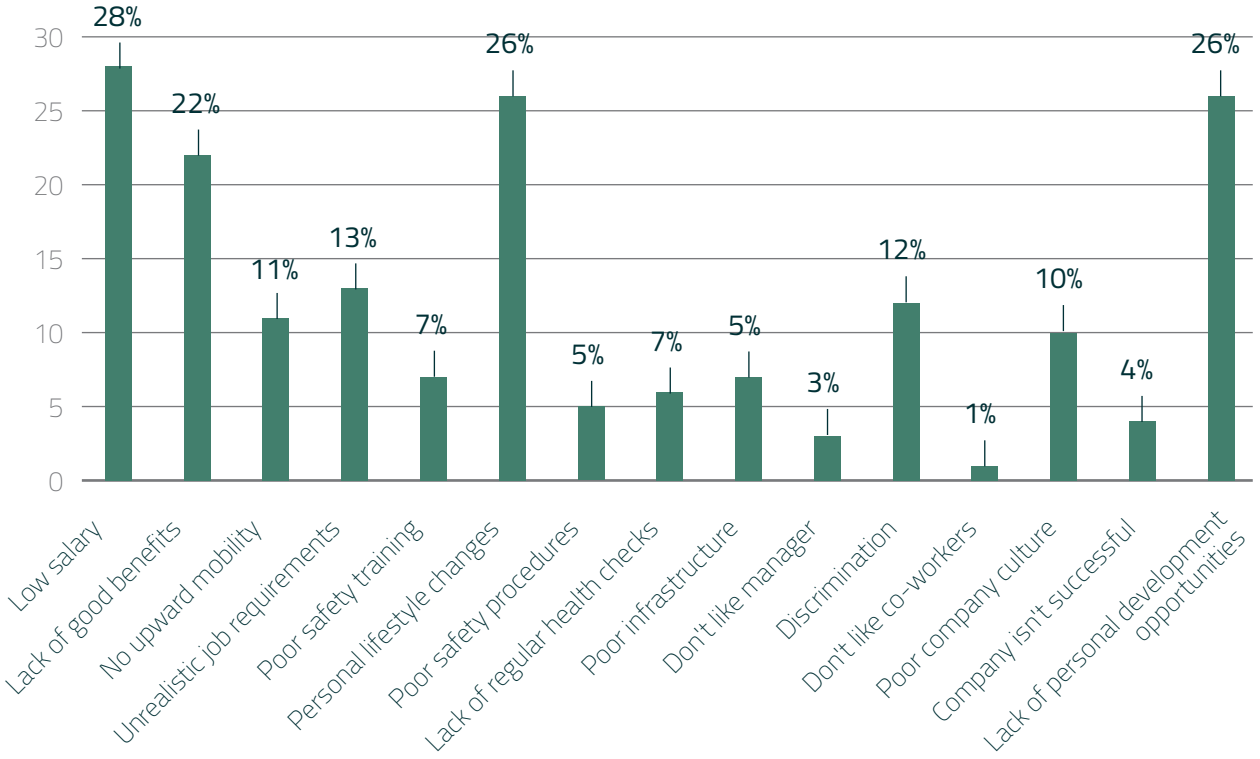
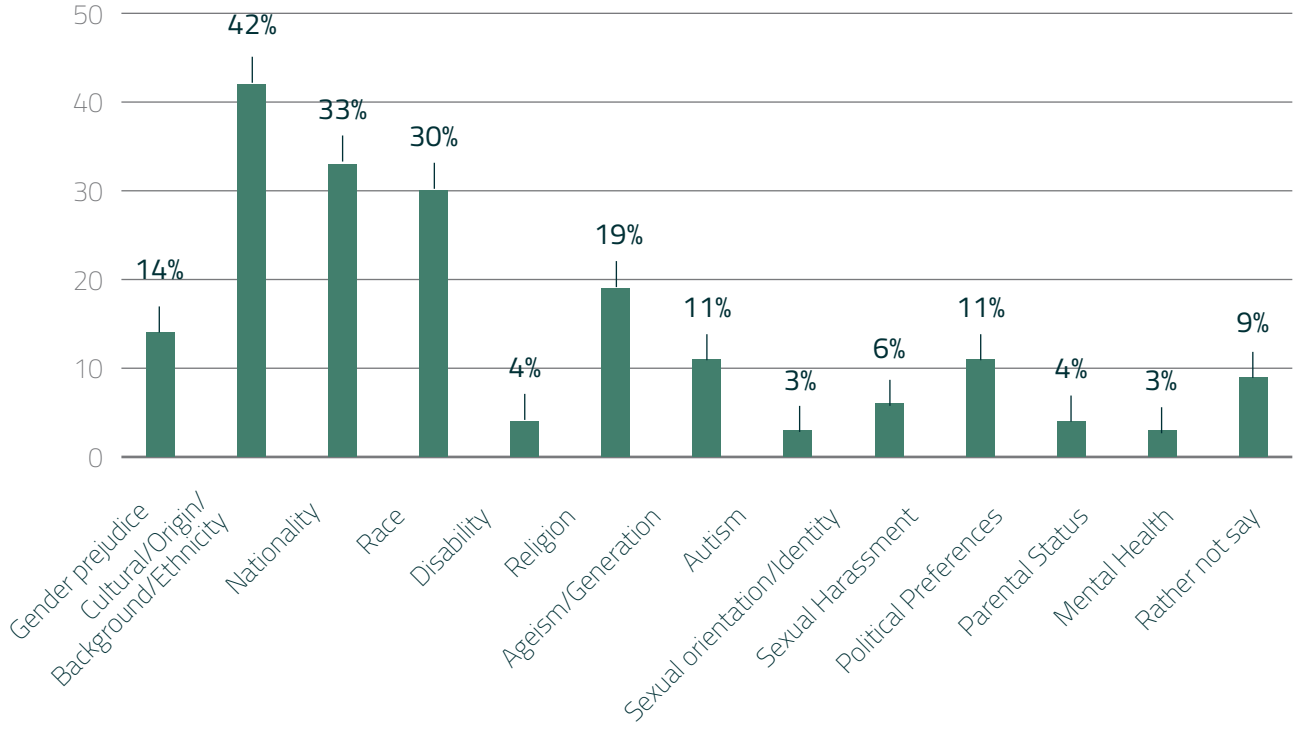
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



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Middle East

With oil prices beginning to recover since the supply reduction agreement between the Middle East and Russia, the energy industry in the Middle East is still experiencing economic challenges. Oil producers in the Persian Gulf region in particular, are suffering due to weaker oil prices, which is forcing governments to cut fiscal spending.

Despite Covid-19, the renewables sector in the Middle East has continued to attract investment. With the demand for energy remaining stable throughout the pandemic, and the region's drive towards decarbonisation, renewables are at the top of the energy policy agenda.

Mining is one of the largest sources of revenue in the Middle East, and in Saudi Arabia in particular. Despite some supply chain issues, the sector remains strong in its demand for mineral oil, metals and inorganic chemicals. However, longer-term, the global shift towards renewables will likely have a negative impact on the mining sector in the Middle East.

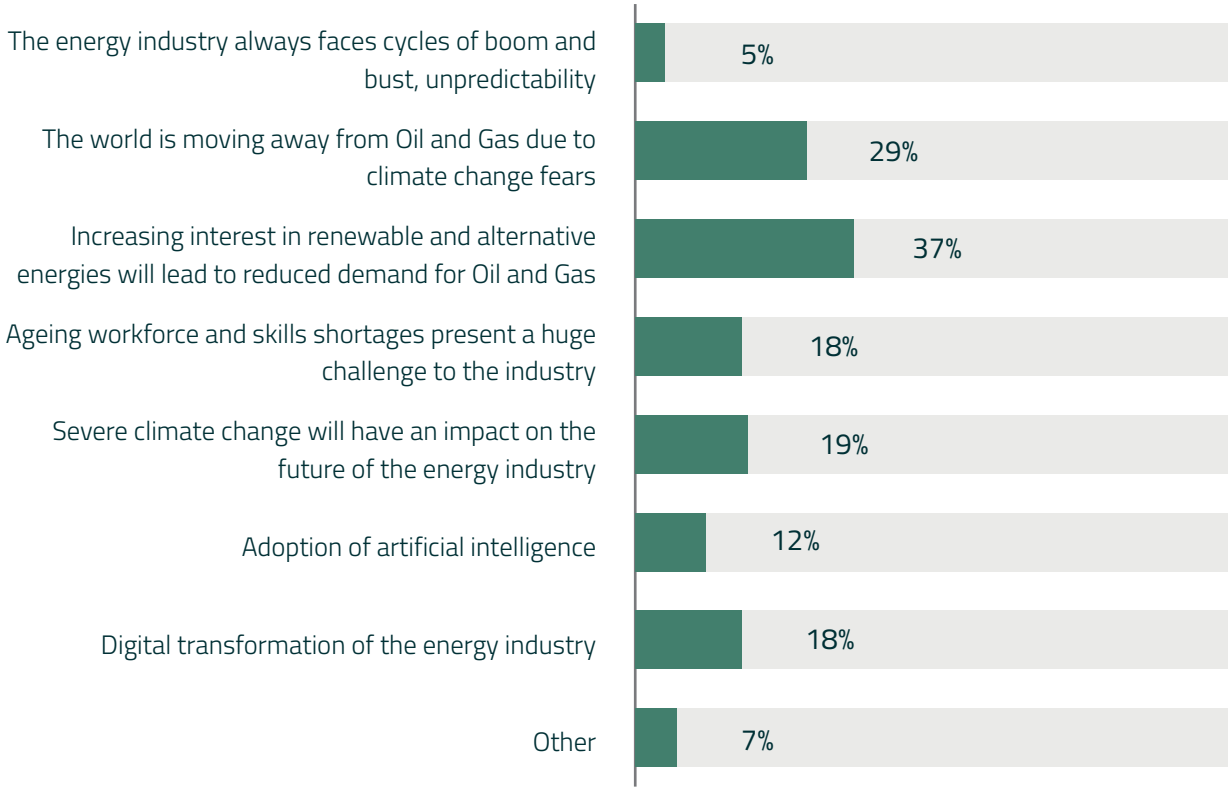
Recruiters in the Middle East say the biggest challenge that the industry is facing is the increasing interest in renewable and alternative energies and how it has created a reduced demand for Oil and Gas (37%). The key cause of skills shortages in the region is inadequate succession planning (42%). To bridge the skills gap, companies are upskilling their existing workforce (50%) and offering better benefits to workers (26%).

In terms of future outlook, the Middle East has the highest number of workers (47%) who are considering exiting the energy industry within the next 5 years, with a further 22% who say they are unsure. The key reason given for considering leaving is low salary (31%).

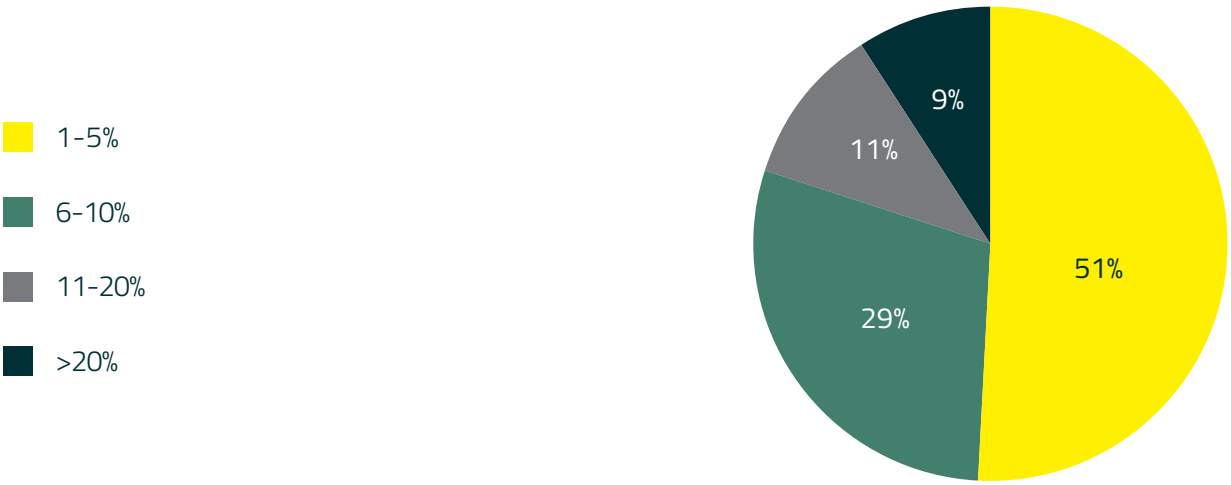
In terms of diversity and inclusion, 27% of workers said they have personally been the target of discrimination, compared to 31% globally, and 38% have witnessed discrimination directed at others, compared to 43% globally. The most common form of discrimination by far, is nationality.

*Statistic details on page 74

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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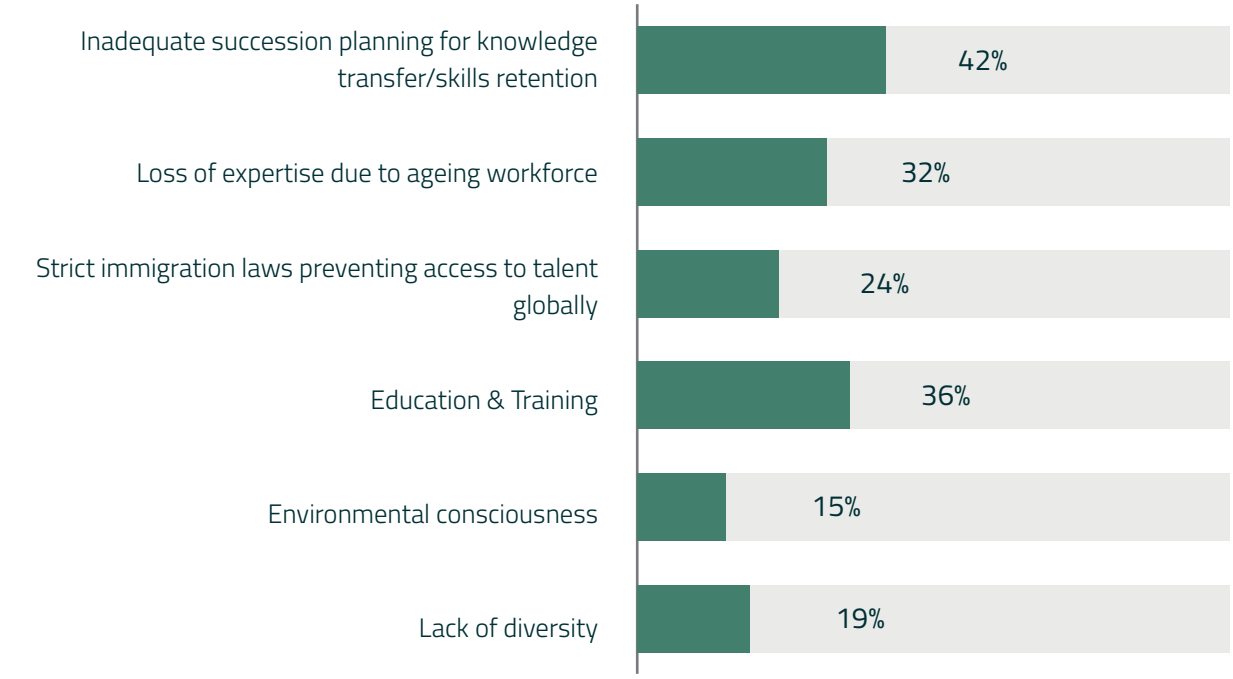
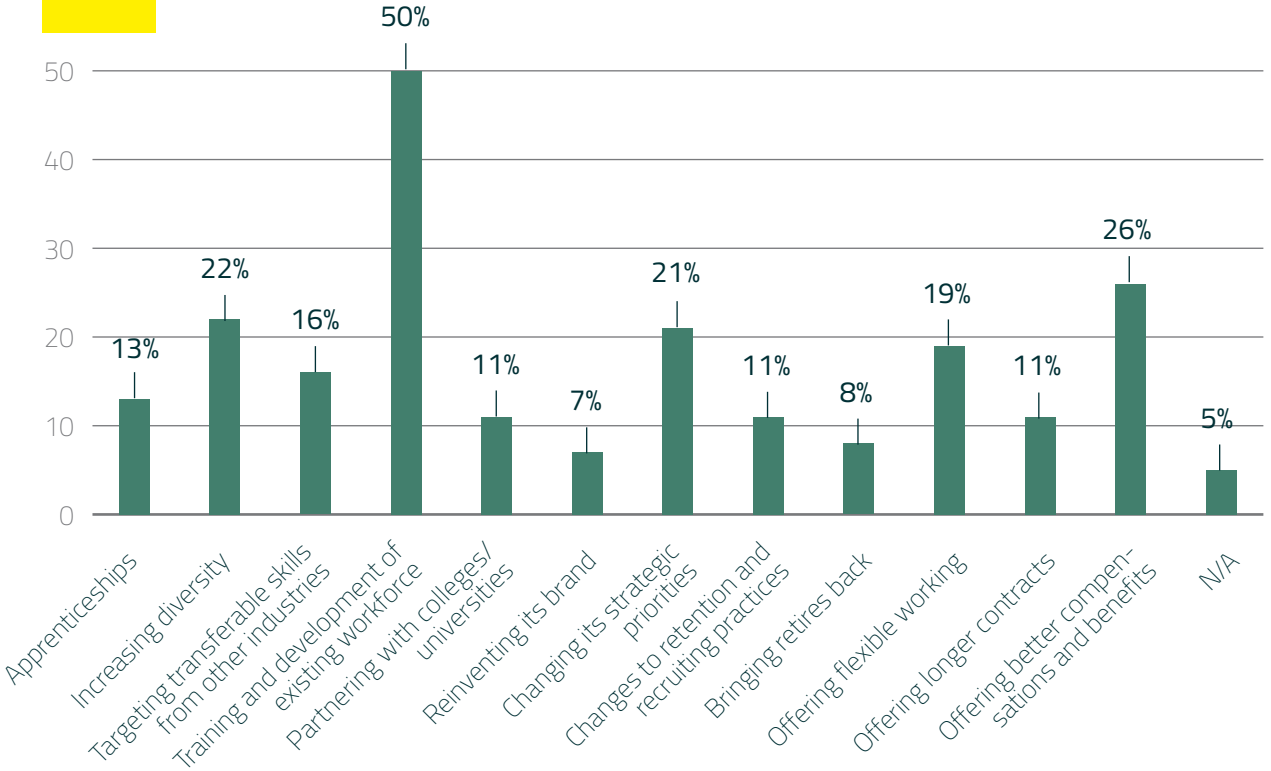
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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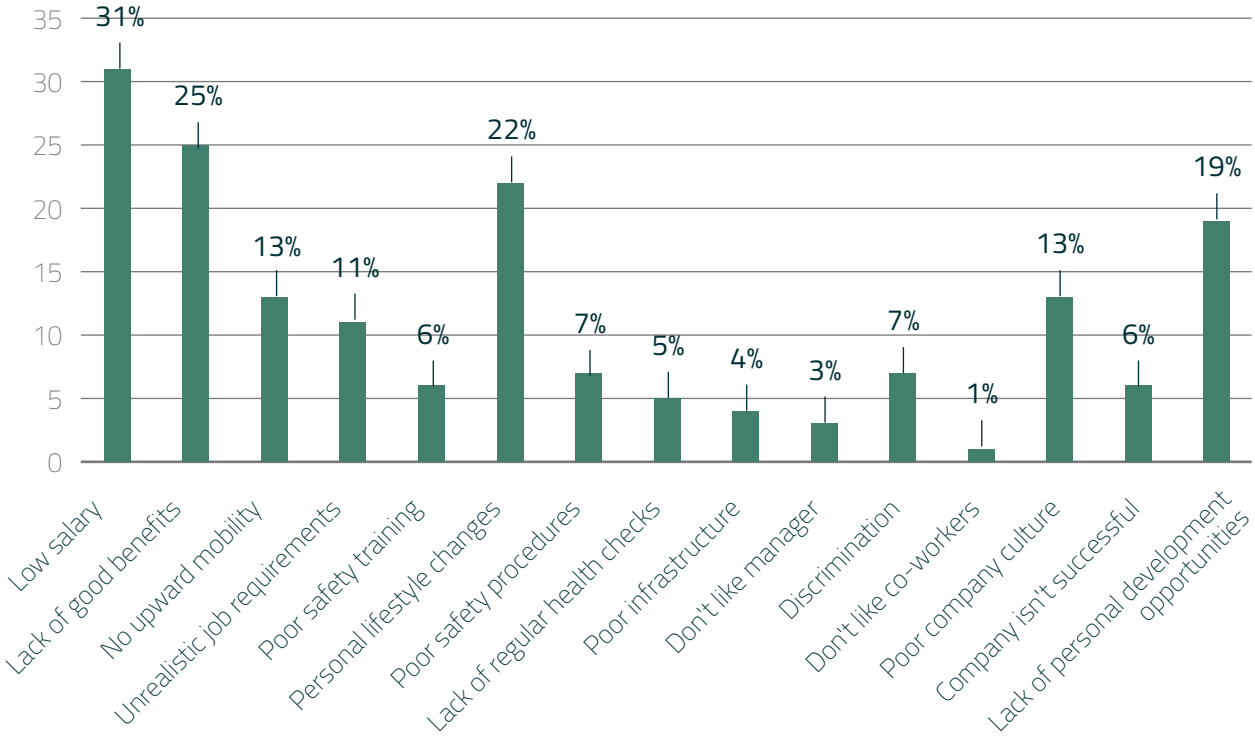
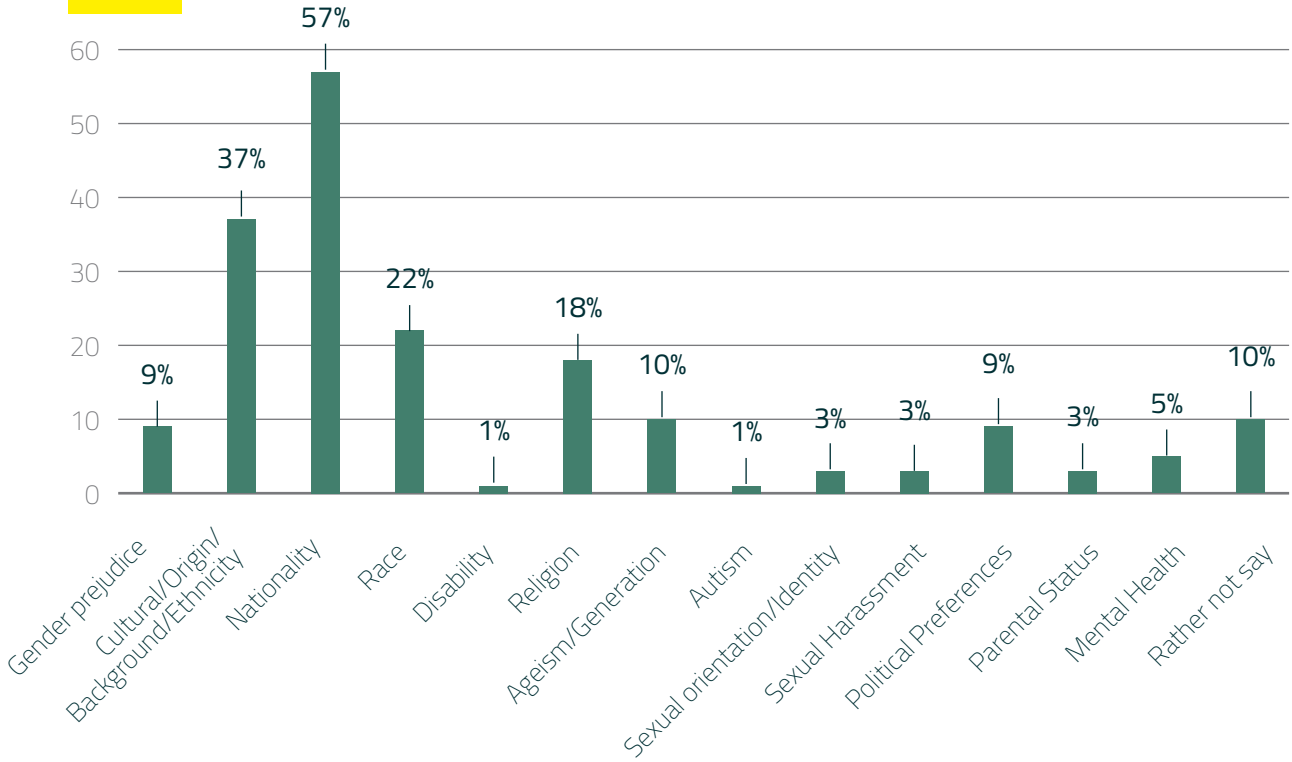
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



*Statistic details on page 74

Asia

China's current gas shortage is having a global impact. To conserve energy, many factories are being forced to close down production. Despite energy demand surging in China post-COVID-19, the country is facing months of shortages. In the short term, the Chinese government has reverted back to using 'dirtier' fuels despite its target to reduce its reliance on coal. Elsewhere, India's domestic coal production has increased in the last year and across Southeast Asia, coal imports are expected to increase as well.

Despite disruptions caused by COVID-19, investment in renewable energy in Asia has remained stable. Government support initiatives, and the demand for clean energy from an increasing population has enabled renewable projects and investments to continue as normal. In the mining sector, supply chain issues have slowed down production in some countries. However, the demand for iron and steel in countries like India is helping the mining sector's recovery.

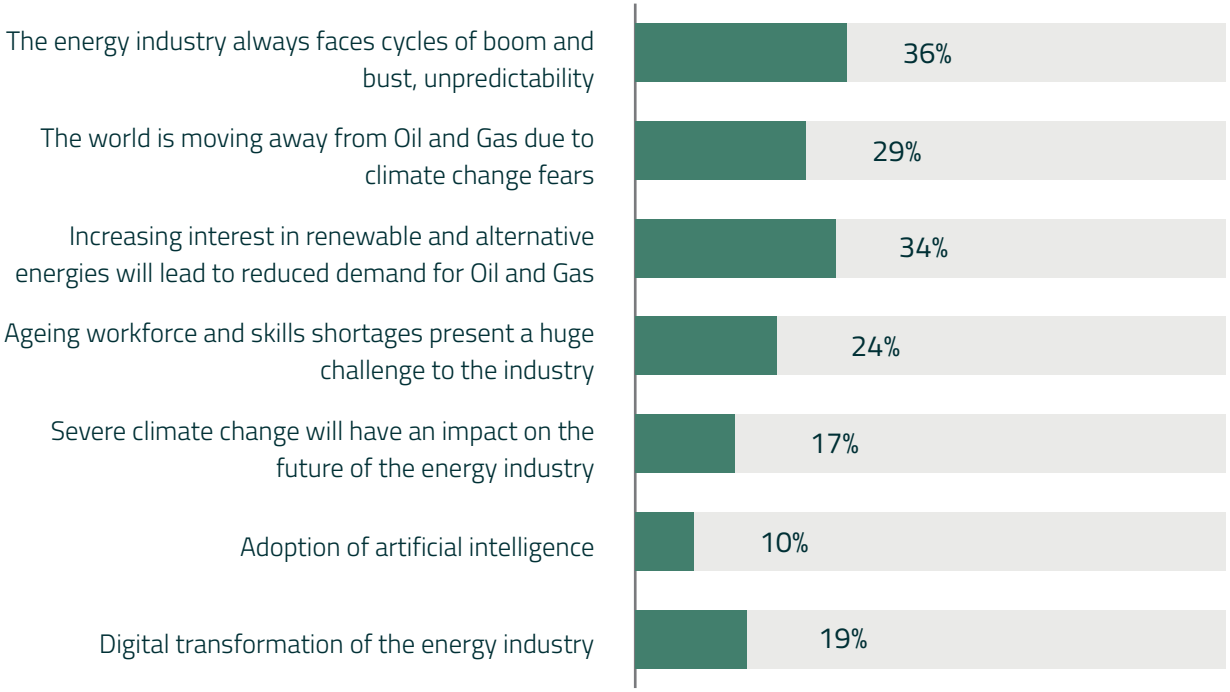
From a recruitment perspective, the biggest challenge that the industry is facing in Asia is the unpredictability of the constant cycles of boom and bust (36%). When asked for the main reason for skills shortages, recruiters say it's due to inadequate succession planning for skills retention (50%). To close the skills gap, recruiters are developing the existing workforce through training (60%).

Looking to the future, 44% of energy workers in Asia say they're considering leaving the sector within the next 5 years, and a further 24% are unsure what they'll do. The main reason for leaving the industry is low salary (33%).

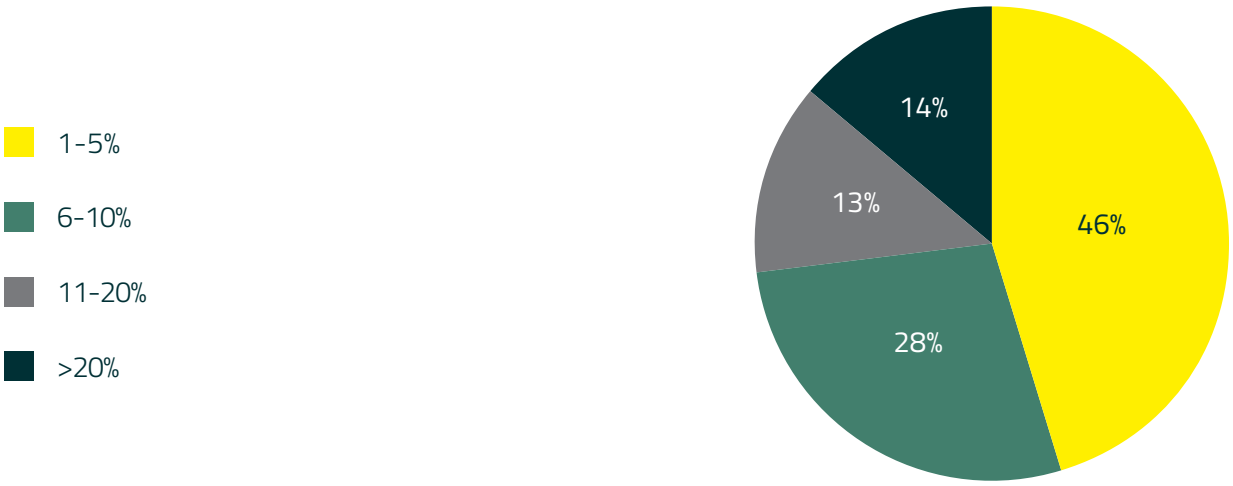
When asked about diversity and inclusion, only 26% of workers said they have personally been the target of discrimination, which is relatively low compared to the 31% global average. When it comes to discrimination directed at others, 35% say they have witnessed incidents, compared to 43% globally. The most common form of discrimination is related nationality, while culture, origin background, or ethnicity was the most common answer for discrimination directed at others.

*Statistic details on page 74

BIGGEST CHALLENGES THE INDUSTRY IS FACING*

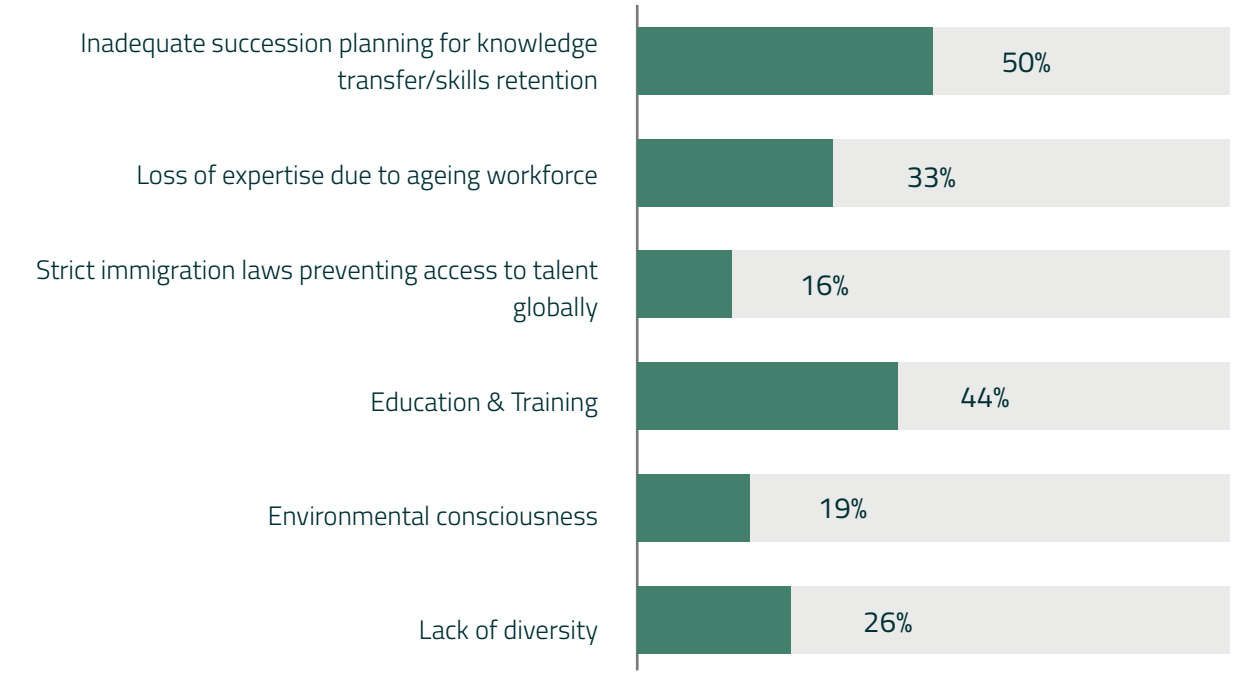


PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS

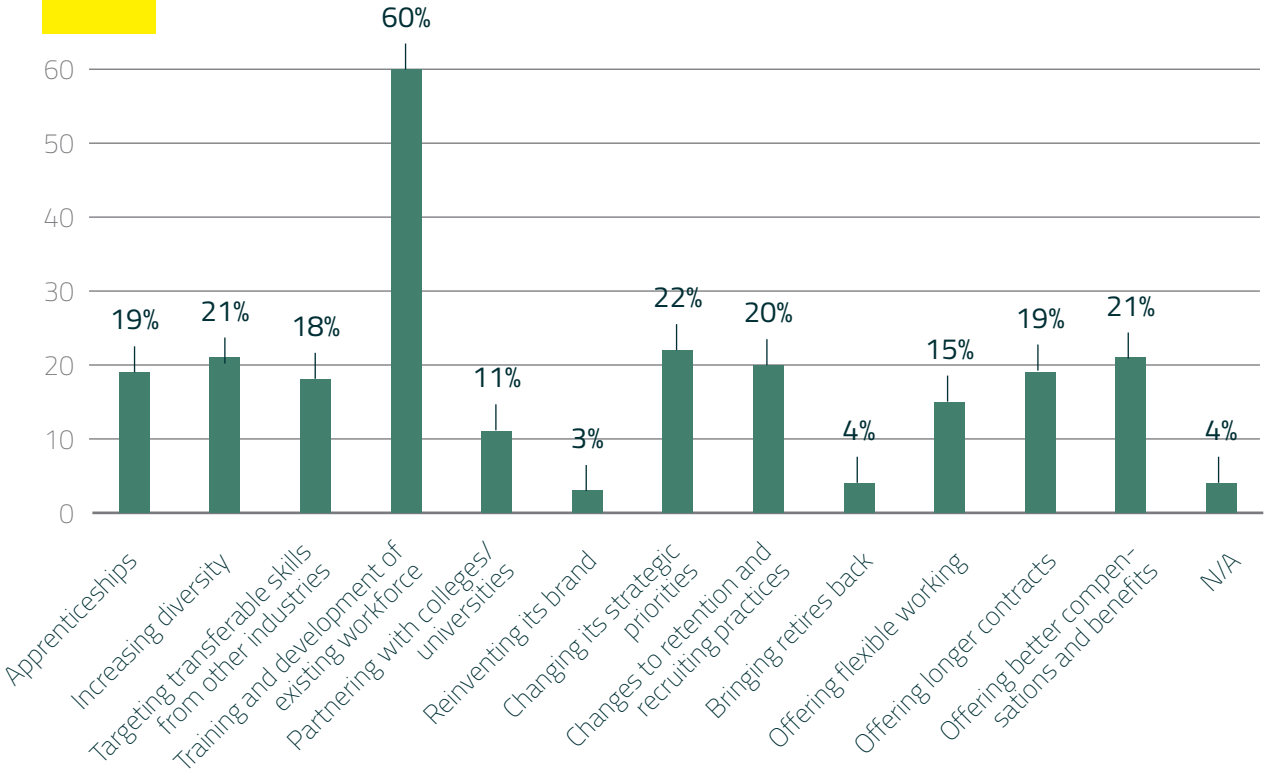


*Statistic details on page 74

KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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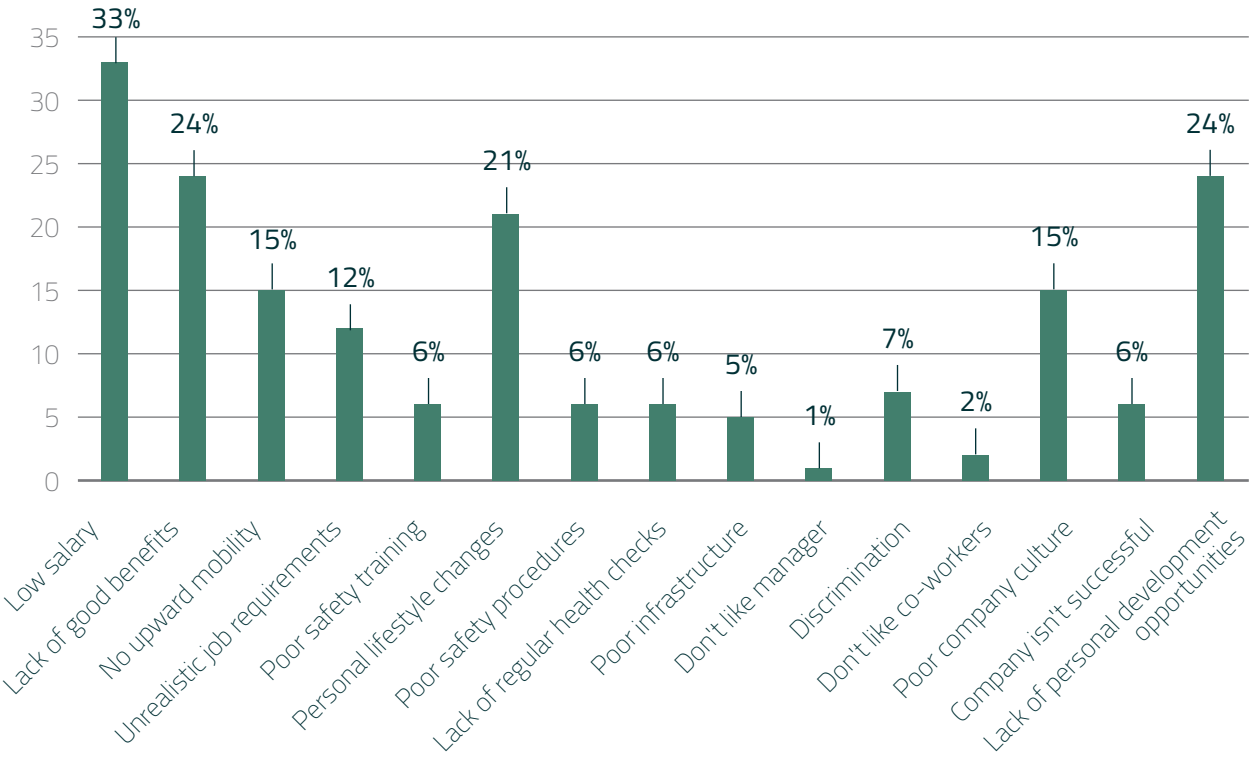
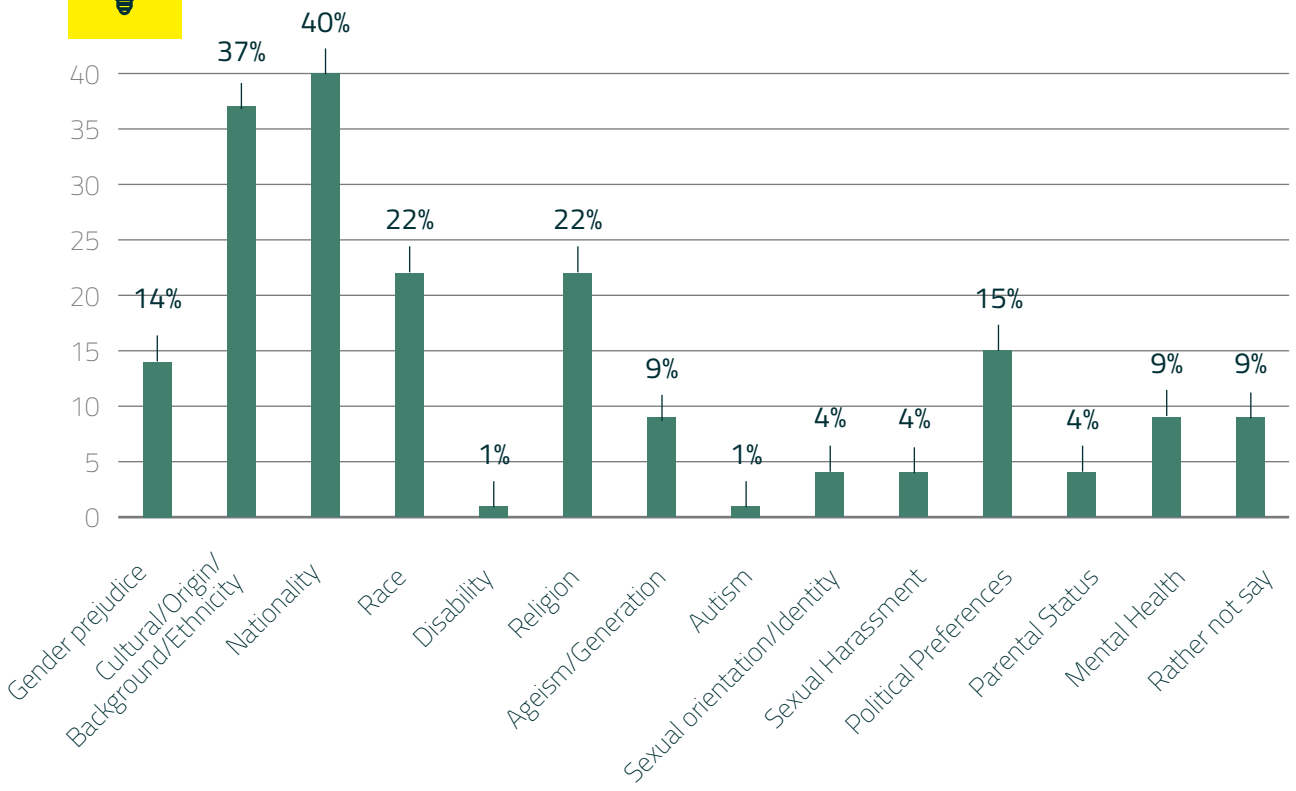
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



*Statistic details on page 74

Australasia

Supply chains across Australasia have been largely resilient following COVID-19, however, climate change has had a negative impact overall. Australian bushfires in particular, have highlighted the vulnerability of supply chains in Australasian countries and its islands. Panic buying of goods and protective equipment, as well as a general reduction in exports has created an urgency to address potential future situations.

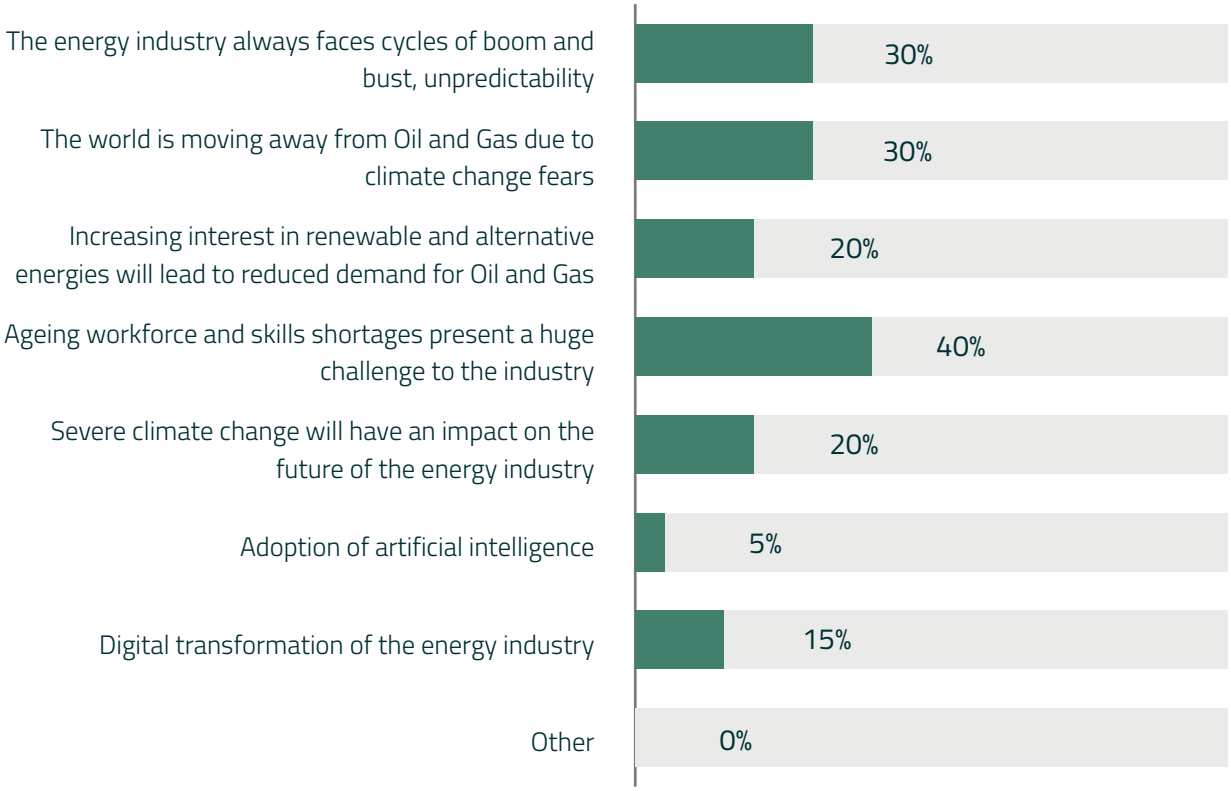
Australasia's renewables sector looks set to continue its growth. The region's climate, topography and greenfield opportunities present an abundance of opportunities to renewables investors. In the mining sector, the pandemic did create some supply chain disruptions. However, to ease the challenges brought about my equipment shortages, the Minerals Council of Australia (MCA) authorised mining companies to co-ordinate on a limited range of activities to ensure they could continue to operate.

In Australasia, recruiters say the energy industry's biggest challenge is the ageing workforce (40%). The primary reason for skills shortages is inadequate succession planning for knowledge transfer and skills retention (50%), as well as education and training (50%). To overcome the skills gap, employers are focusing on training and developing their existing workforce (35%), offering apprenticeships (25%), and flexible working opportunities (25%).

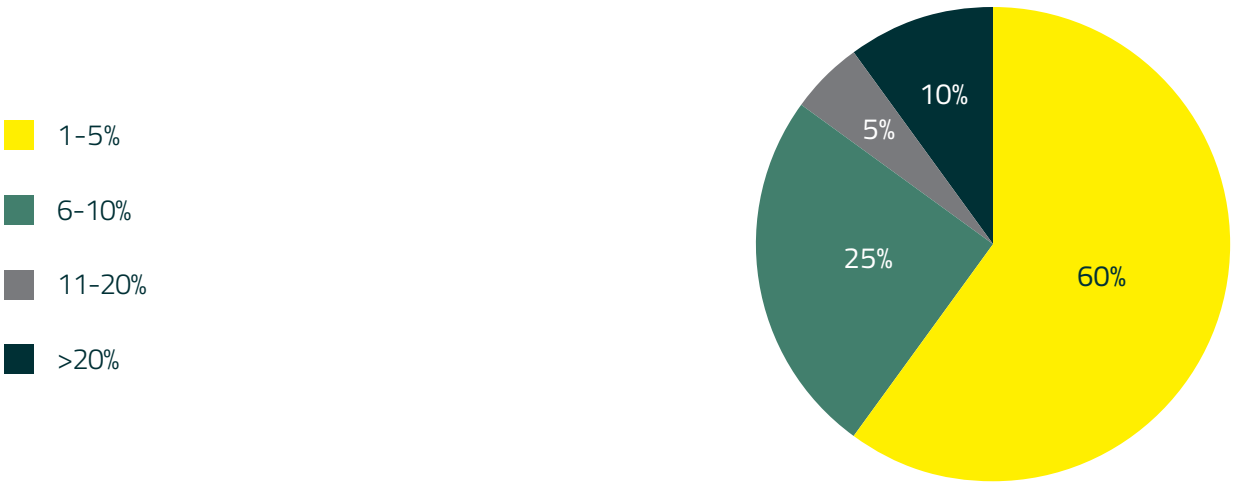
Looking towards the future, a high percentage of workers are planning to leave the industry in the next five years (39%), primarily due to personal lifestyle changes.

When asked about diversity and inclusion, 30% of workers say they have personally been the target of discrimination, compared to 31% globally, and 56% have witnessed discrimination directed at others, which is significantly higher than the global average of 43%. The most common form of discrimination is nationality, followed closely by ageism. Incidents relating to culture, origin, background, or ethnicity is the most common reason for discrimination directed at others.

BIGGEST CHALLENGES THE INDUSTRY IS FACING*



PERCENT OF OPEN POSITIONS THAT HAVE BEEN UNFILLED FOR MORE THAN 3 MONTHS



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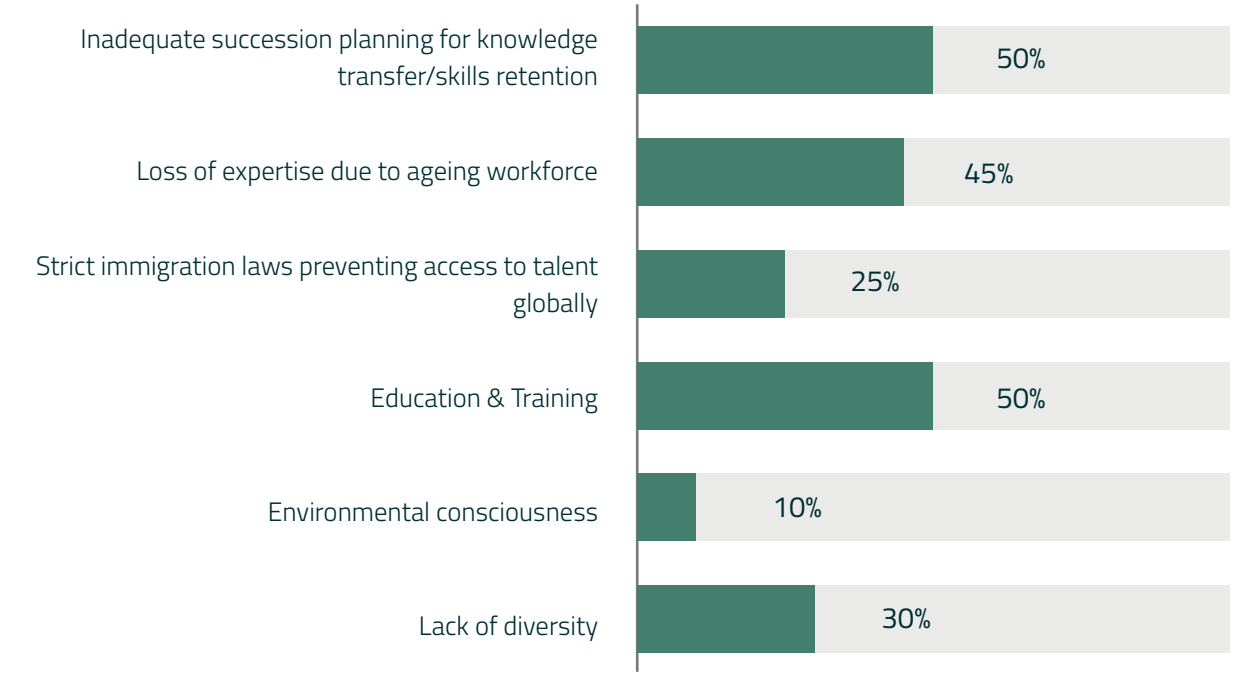
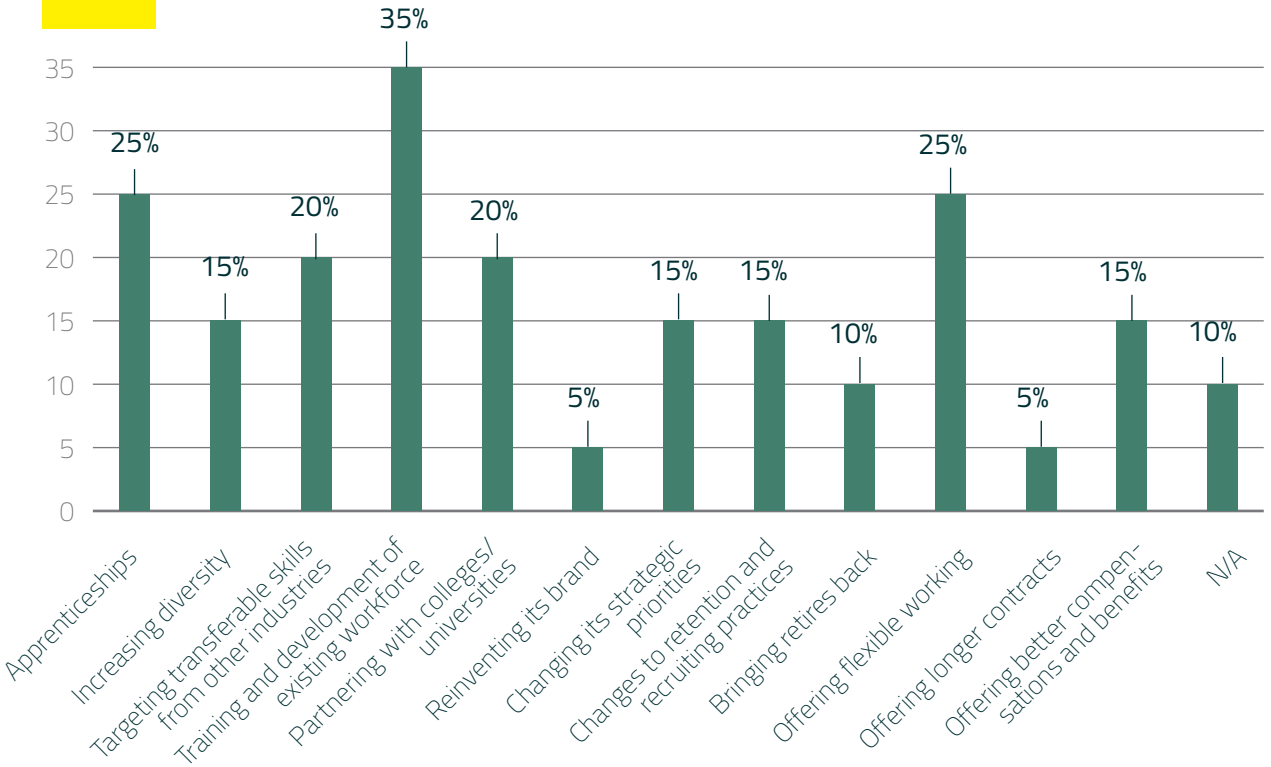
KEY CAUSES OF SKILLS SHORTAGES ACCORDING TO RECRUITERS*



WHAT ARE COMPANIES DOING TO OVERCOME THE SKILLS GAP*



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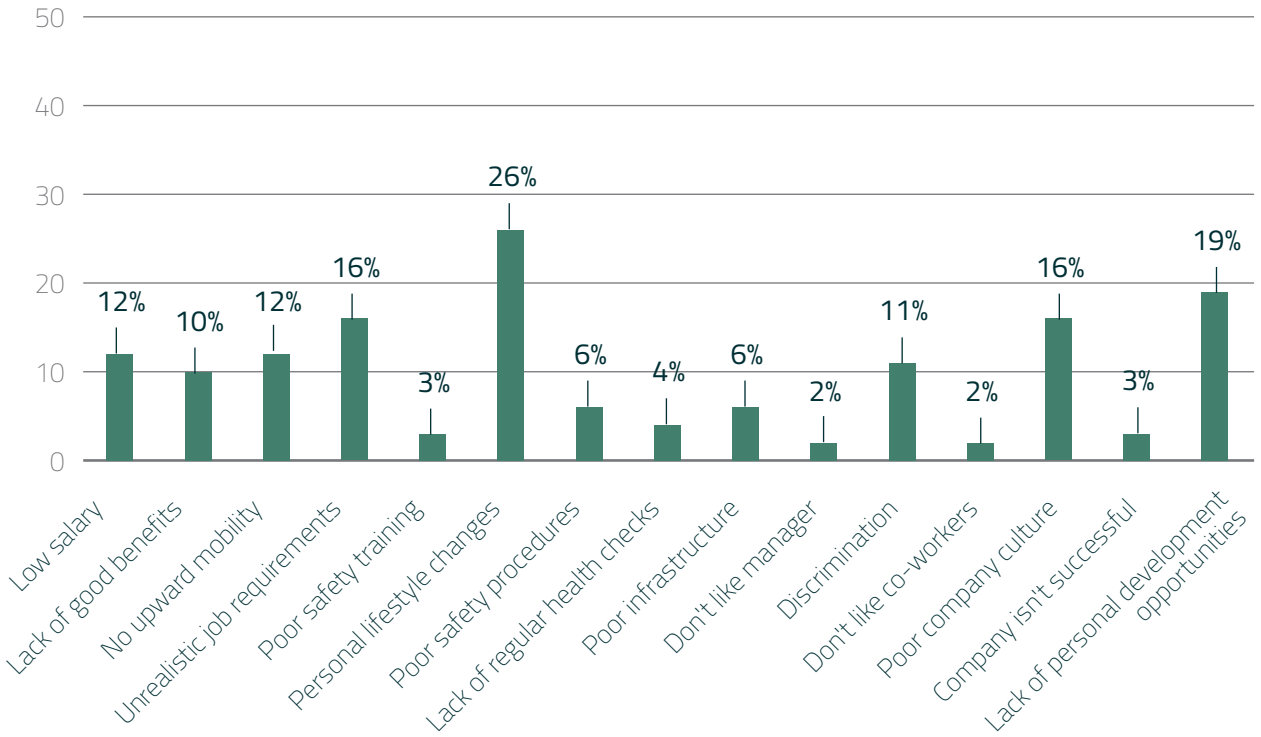
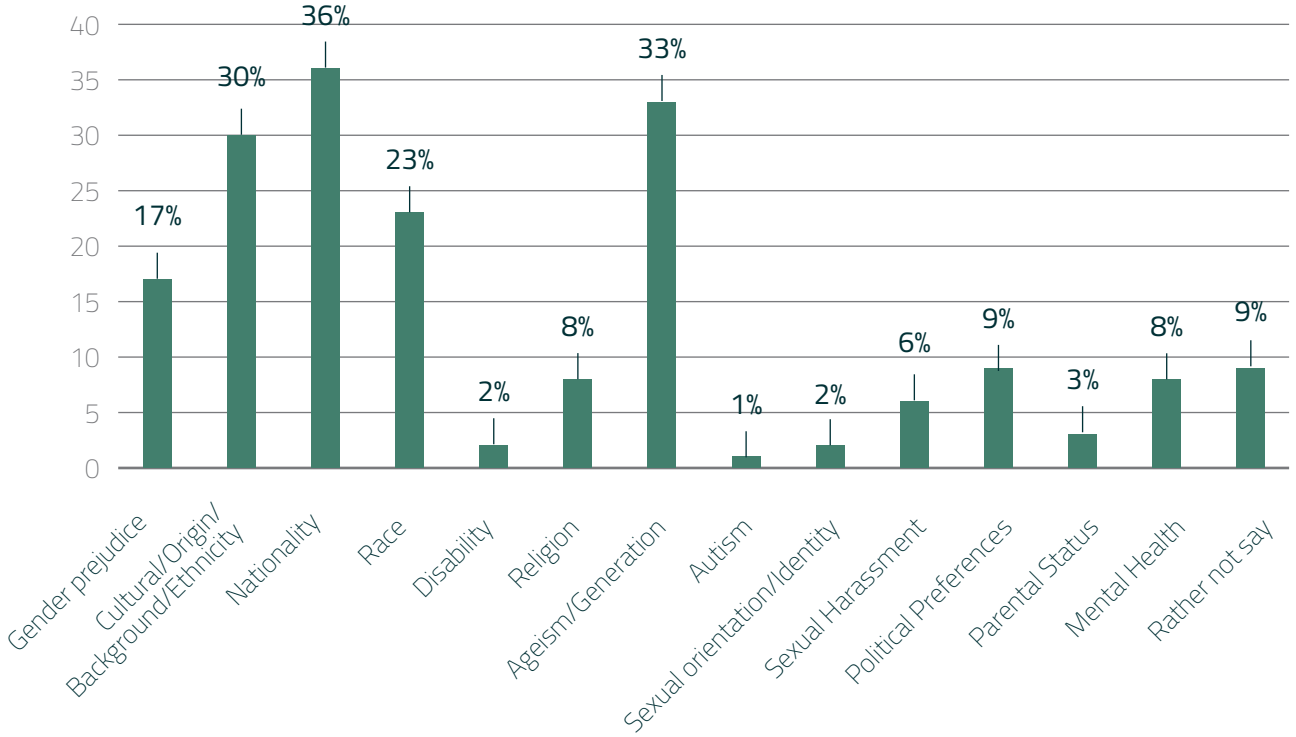
REASONS WHY WORKERS ARE PLANNING TO EXIT THE ENERGY INDUSTRY*



MOST COMMON KIND(S) OF DISCRIMINATION EXPERIENCED BY WORKERS*



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Towards a Positive Future

Despite the challenges facing the global energy industry, there are many exciting opportunities on the horizon, particularly in relation to renewable energy projects.

The Wudongde hydropower plant in China, for example, has now started operations, with electricity being transferred to the southern China power grid. Likewise, the previously delayed Ghana Wave Power Project has been revived after a partnership agreement was reached.

The future is also looking positive for the mining industry, where almost all mineral and metal prices are expected to rise over the coming year. Notably, the Iron Bridge Magnetite project in western Australia is an exciting development that was completed in late 2021.

There has also been progress on net zero targets with both Saudi Arabia and Australia recently announcing their plans to decarbonize. Australia has pledged to achieve net zero carbon emissions by 2050 and Saudi Arabia has pledged to reach net zero by 2060. During COP26, more major economies also announced new commitments. China pledged to achieve net-zero emissions by 2060 and India pledged to achieve net zero by 2070 and focus more on renewable energy.

The global energy industry also looks set to embrace green hydrogen in the coming years in the pursuit of net zero. The fuel, which is obtained from electrolysis of water with electricity, could supply up to 25% of the world's energy by 2050. Seven of the biggest green hydrogen project developers have recently assembled to launch the Green Hydrogen Catapult Initiative in a bid to increase the production of green hydrogen 50-fold in the next six years.

Across all sectors of the energy industry, supply chain issues are proving challenging to navigate. Increases in transportation and shipping costs have slowed down the supply chain network and backlogs are threatening global economies. Coupled with the industry's skills shortage in traditional energy sectors like Oil and Gas, in many ways, supply chain issues are becoming worse.

The Oil and Gas sector in particular needs to embrace its challenges and focus on attracting young workers. This will mean raising salaries, providing training programmes and flexible working opportunities.

As the energy industry continues to embrace digital transformation and autonomous initiatives, workforce learning and development will be critical to attracting and retaining talent. Companies will likely need to seek expertise outside of the energy industry and access untapped talent pools. They'll also need to demonstrate their commitment to diversity and inclusion by fostering a culture of inclusivity, and by repositioning their brand to align with the environmental narrative and the values of younger workers.

In closing, we'd like to thank all the respondents who took part in this year's survey. The insights we gather from your replies benefit the energy industry as a whole as we continue to navigate this ever-evolving sector.

Demographics

The demographic chapter breaks down the data of the findings by identifying the participants of the survey.

SECTOR OF EMPLOYMENT*

SECTOR	EMPLOYMENT
Oil and Gas - Upstream	39%
Oil and Gas - Midstream	23%
Oil and Gas - Downstream	28%
Renewables - Biogas	5%
Renewables - Solar	9%
Renewables - Hydropower/Tidal	6%

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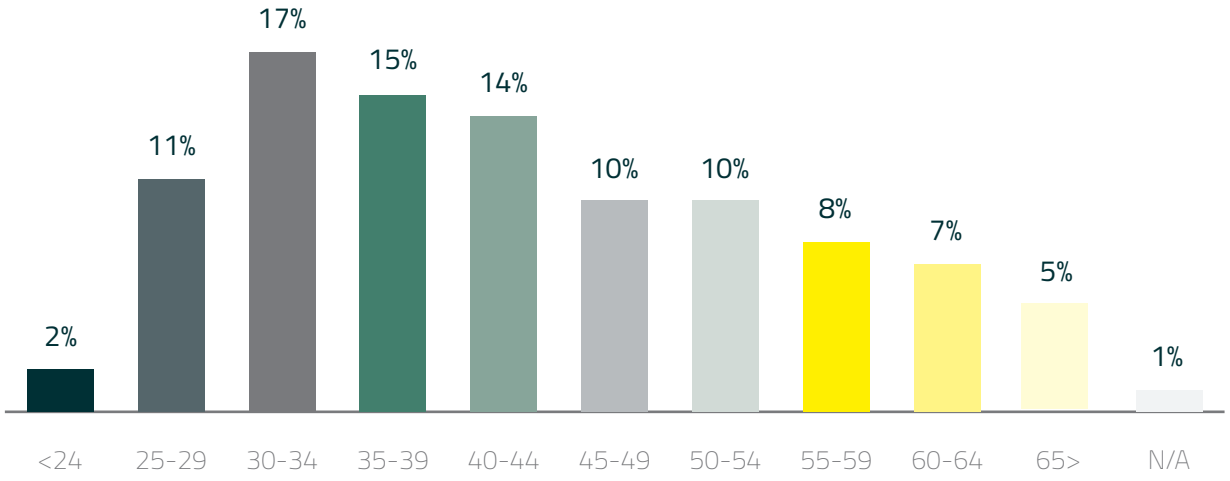
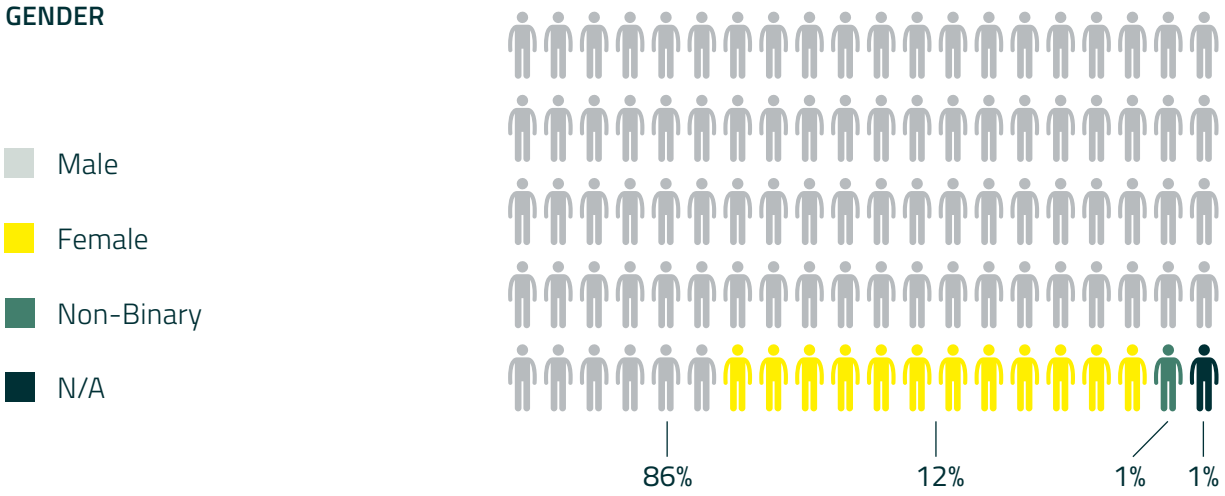
SECTOR	EMPLOYMENT
Renewables - Windpower	8%
Renewables - Design	6%
Mining - Concept	4%
Mining - Exploration	4%
Mining - Discovery	3%
Mining - Development (pre-construction)	4%
Mining - Construction	8%
Mining - Production (Operations & Maintenance)	8%
Mining - Mine closure & Rehabilitation	2%
Mining - Monitoring & Evaluation	2%
Mining - Design	2%
Power - Nuclear	4%

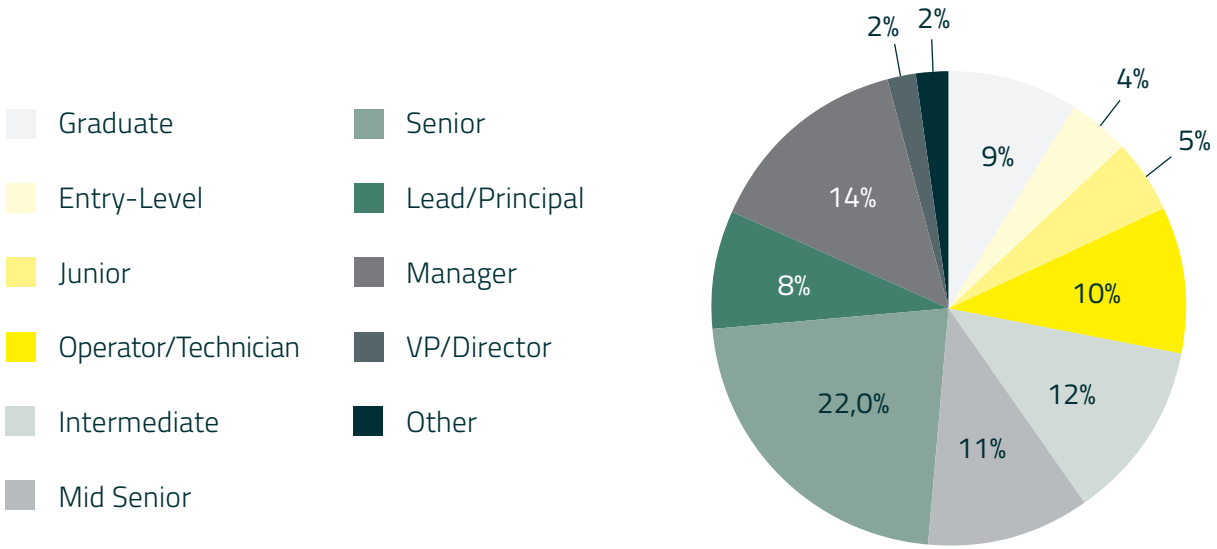
AGE



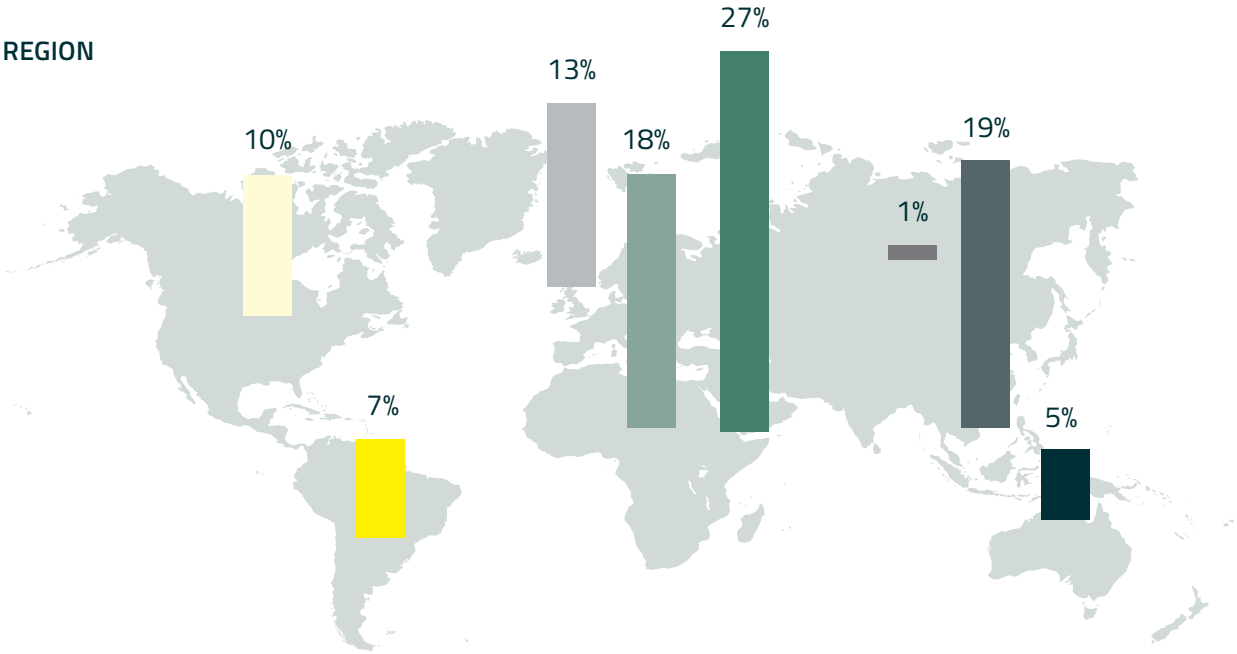
GENDER



SENIORITY

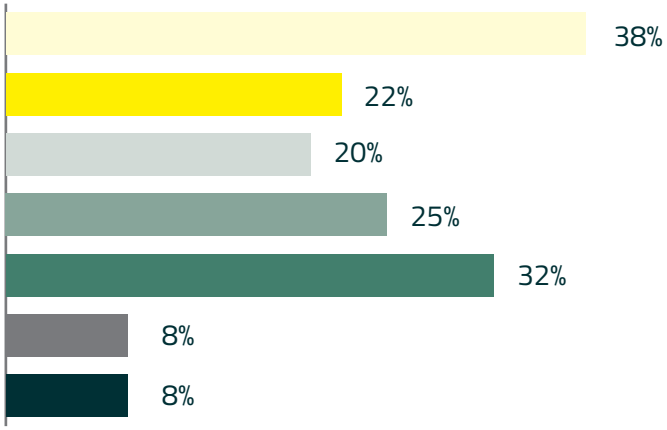


REGION



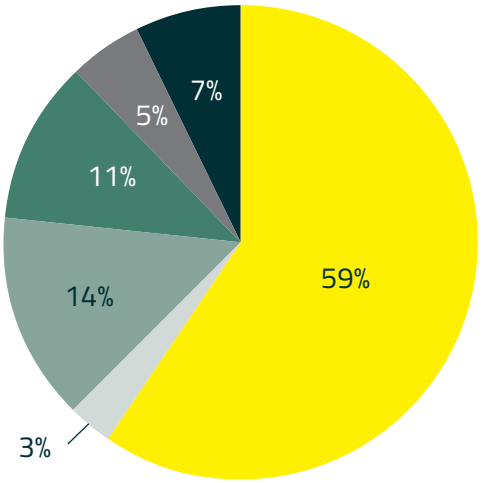
North America
Europe
Middle East
Asia
South America
Africa
CIS
Australasia

WORKPLACE*



Onshore
Office based
Offshore
Hybrid
Home based
Other
Field based

EMPLOYMENT TYPE



Permanent/full-time
Contracted by agency
Permanent/part-time
Contract short-term
Contracted direct
Contract long-term

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* The graph is highlighting results from a multi select question. As a result, the total response percentage exceeds 100%.