GETI

Global Energy Talent Index

airswift
TRUSTED WORLDWIDE

energyjobline

The Global Energy Talent Index Report

2021

Opportunity from uncertainty

Welcome to GETI 2021

When we launched the Global Energy Talent Index (GETI) in 2017, our goal was to help companies throughout the energy sector to attract, retain and develop essential talent. Since then, GETI has offered original insights drawn from the input of tens of thousands of professionals across the industry.

It has also tracked a period of remarkable change in our industry. But nothing has come close to the convulsions caused by the COVID-19 pandemic of 2020, which introduced unprecedented amounts of disruption. Of course, the pandemic is not the only story of the year. The energy transition is continuing. Decarbonisation has raced up the global political agenda, while geopolitical tensions showed no sign of calming down.

In effect, the pandemic has exacerbated the uncertainties in what was already set to be an uncertain year. To make sense of it all, we have chosen this year to explore what the current instability might mean for the future. Will there be a new normal or series of normals? How do companies manage fear, uncertainty and doubt? What does the resilient business look like when the entire industry is in a state of flux? And how does recruitment and retention fit into all this?

This year's report was written just as pharmaceutical companies were announcing potential vaccines. But participants shared their views long before the news broke. Not surprisingly, disconcerted professionals are concerned for the future of their sector and for their personal career progression. Every individual and every sector has experienced change in their own way, but some broader themes have emerged:

- There's no going back. Workplace flexibility is here to stay – at least for the foreseeable future. After this year's enforced experiment in remote working, that's what the new normal looks like for an overwhelming number of our respondents. It's also going to be a greener sector: where respondents experienced growth, it was often due to a still-accelerating energy transition.

- Money worries persist – often at a sector level. Even where salaries have fallen, or pay rises have slowed, most workers believe that pay rates will pick up again next year. But some of the biggest concerns are the long-term economic outlook (especially when tied to public-health concerns), and capital availability for non-green projects.

- Respondents have faith in their own sector's resilience – but there remains room for improvement, especially when it comes to looking after existing staff. Most workers see training and mentoring schemes as an important way to protect their firm against new and emerging challenges.

That said, at a time of maximum instability and insecurity, there are signs of optimism – especially over a longer time frame – even if it has taken a knock this year. Yes, job security feels more elusive, but optimism and resilience are there. To build that resilience still further, hiring managers can consider taking the following actions:

- **Communicate and clarify:** Look at training, mentoring and retention programmes and ensure that they are readily accessible, well understood and focused on meeting employee needs and ambitions. That may also require putting together a robust defence of training staff during a downturn to prevent a repeat of previous talent-draining episodes.

- **Step up on STEM:** Ensure that employment brands include a renewed focus on the use of innovative engineering techniques, smart digital technologies and the pivot to the energy transition. These are all appealing to the young people, graduates and apprentices with STEM qualifications that all sectors need to attract and retain.

- **Focus on flexibility:** Some employees will be delighted to return to normal working days. Some will not. Remote working is set to accelerate, and hybrid teams are likely to be the way forward. Hiring managers will need to work with team leaders to ensure that everyone is engaged, supported, and motivated regardless of how they choose to work.

When we first developed the annual GETI report it was with the aim of helping businesses throughout the energy industry to understand the unique challenges they face in narrowing the skills gap and bringing out the best in their people.

That goal has never felt as important as it does right now. So we hope that upon reading this report hiring managers will feel better equipped to address the fall-out from this most difficult of years – and develop the recruitment and retention strategies they'll need for the future.

Of course, we couldn't do this without the thousands of energy professionals who, by sharing their experiences and views, help us to make each year's report more authoritative than the last.

On behalf of everyone at Airswift and Energy Jobline, thank you.

Janette Marx,
Chief Executive Officer at Airswift

Josh Young,
Director at Energy Jobline

Contents

Methodology

This is the fifth edition of the annual Global Energy Talent Index (GETI), the energy industry's biggest and best global workforce trends report. Building on the success of the four previous volumes, GETI 2021 encapsulates the views of 16,000 energy professionals of 151 different nationalities and spread across 166 countries.

The 43-question survey was open for eight weeks and closed in October 2020, when, with the help of project sponsors and partners, it surpassed its response target.

Airswift and Energy Jobline subsequently studied the data to draw out the key insights detailed in the report. In addition to the survey responses, Airswift analysed key industry and internal data in the following three tiers:

- Active contractor headcount
- Active candidates looking for their next role
- Third party data benchmarks

For ease of reference, salary and rates data has been averaged across several countries within one region, but more specific salary info can be provided upon request.

GETI's remit extends far beyond that of a straightforward salary survey. Each year, it takes a close look at the issues and challenges facing the energy industry, with recent editions covering subjects such as the impact of digitalisation on the workforce, the looming skills crisis and the strength of organisational culture.

This year, it delves deeper into the uncertainty facing the sector. COVID-19 is just one of a huge range of issues facing firms over the coming months and years. Businesses from across the energy mix face a faltering economy, widespread geopolitical unrest, and a fragile oil market that even saw negative prices in 2020. And this is all set against the backdrop of the energy transition, popular demand for which continues to grow.

OPPORTUNITY FROM UNCERTAINTY

As these challenges intersect in new and unpredictable ways, there is only one thing of which energy businesses can be certain: nothing is certain. It is impossible to say what the industry will look like in five years' time – let alone what bumps businesses might encounter on the road ahead or, on the other hand, what new avenues and opportunities will open up and inspire the next wave of growth and innovation.

What impact is this unsure environment having on the workforce? What talent strategies have been put in place to steer companies along this journey? How have these strategies impacted professionals' confidence in their sectors' ability to successfully navigate into the future? And what changes need to be made to both increase resilience and flexibly position firms to not just survive, but thrive, in the new normal – whatever and whenever that may be?

GETI 2021 aims to help readers answer these questions and more. And, crucially, offer guidance and support to professionals and hiring managers alike as they step deeper into the unknown.

Airswift and Energy Jobline hope this report proves useful to all who read it and invite anybody who requires further detail, analysis or insight to get in touch at enquiries@getireport.com.

Airswift

Airswift is an international workforce solutions provider within the energy, process and infrastructure industries. With more than 7,000 contractors and 700 employees in over 60 offices worldwide, our talent pool and geographical reach are unmatched in the industry.

For 40 years, Airswift has been passionately transforming lives through the workforce solutions we provide, including talent acquisition, global employment and mobility, managed solutions and consulting.

We provide strategic support to our customers, resulting in trusted partnerships that are aligned and efficient. Our team of experts are ideally positioned to meet your needs, whether that is finding top talent, mobilising people around the world, implementing an agile workforce strategy or improving decision-making for workforce planning.

For more information, please contact us or visit our website.

geti@airswift.com

www.airswift.com

airswift
TRUSTED WORLDWIDE

Energy Jobline

Energy Jobline is the leading specialist job board for the energy industry globally, hosting an audience of over 4 million professionals and working with an extensive partnership network of Societies, Publications, Corporate Employers and Recruitment Agencies. Energy Jobline advertises a large volume of the world's energy and engineering jobs mainly in the Renewables, Power, Nuclear, Oil & Gas, EV & Battery sectors.

Energy Jobline is the pioneer of energy recruitment, hosting an exclusive database. Our job board is a significant value-add to any energy employer or employee on a global spectrum.

We have a highly engaged audience who use Energy Jobline for not only their job search, but also the latest energy news, training, events and contractor services.

Whether you are looking for a new job opportunity or looking to hire the best talent in the energy market, please contact us to discuss in more detail.

geti@energyjobline.com

www.energyjobline.com

energyjobline

Partner Directory

The Energy Institute is the not-for-profit chartered professional membership body bringing together expertise to tackle urgent global challenges. Responding to the climate emergency while meeting the energy needs of the world's growing population calls for energy to be better understood, managed and valued.

We are a global, independent network of professionals spanning the world of energy, convening and facilitating debate, championing evidence and sharing fresh ideas, giving voice to issues of concern and where necessary challenging the industry.

https://www.energyinst.org/

Chaired by Ruth Cairnie, POWERful Women (PfW) seeks to advance the professional growth and leadership development of women across the UK's energy sector.

By bringing together a mix of industry, academic and political leaders – spanning exploration, energy generation & supply, energy efficiency, technology, government and consumer issues – we work to support and encourage energy companies to appoint more women to senior roles as part of building stronger businesses and adapting to changing markets.

https://powerfulwomen.org.uk/

Oil and Gas

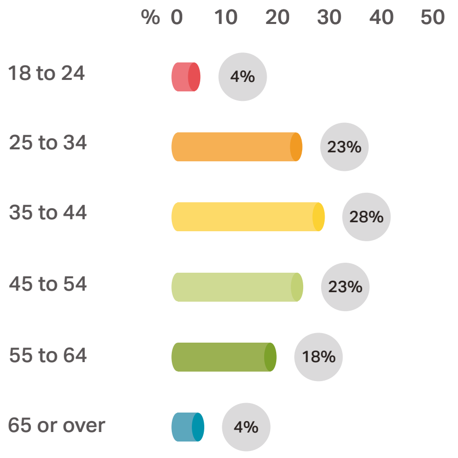
Contents: Oil and Gas

Oil and Gas

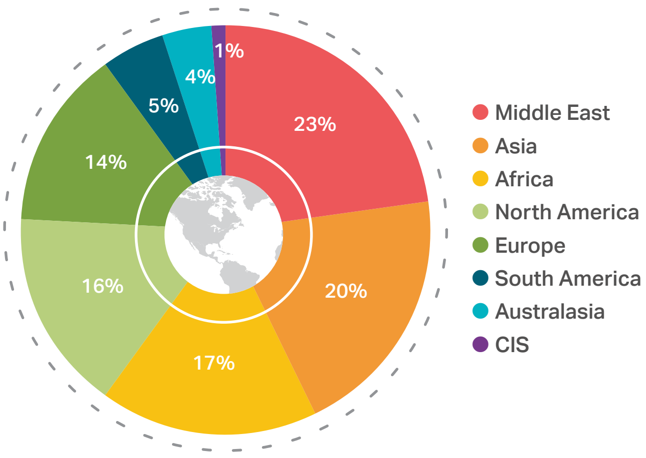
Having weathered the downturn, the oil and gas sector now faces an even bigger challenge. Previous issues have been exacerbated by the pandemic, notably the looming skills shortage. Although the sector now appears to be better placed to address these challenges, continued investment in innovative technology and people will be needed to ensure that hopes for the medium-term future can be realised.

1. DEMOGRAPHICS

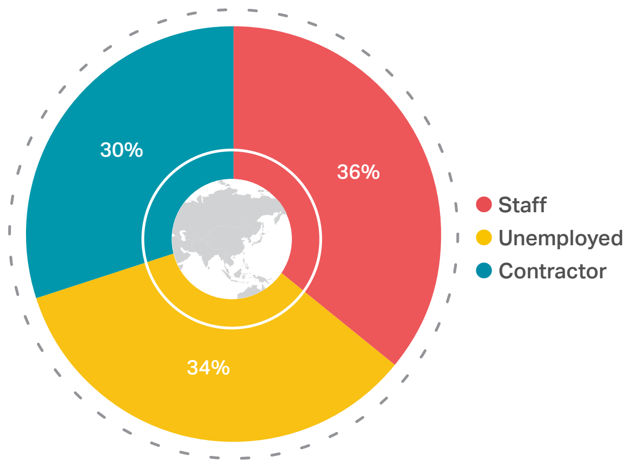
AGE



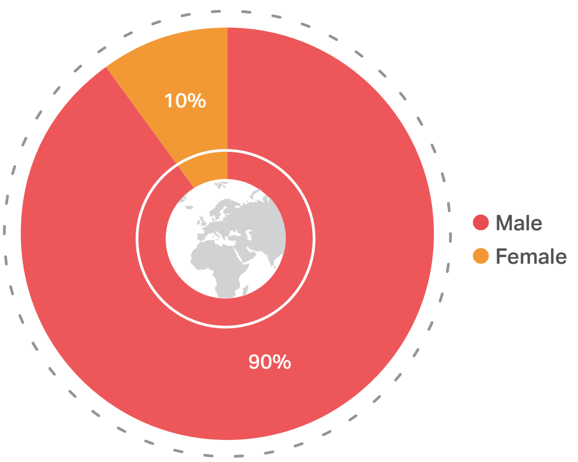
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

For the first time in GETI history, more professionals in the oil and gas sector report a fall in pay rather than an increase. For about one in four professionals that cut is substantial: 24 per cent say that salaries and day rates have fallen by more than five per cent. For context, only 11 per cent reported a similar drop last year.

PERMANENT WORKER ANNUAL SALARY, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

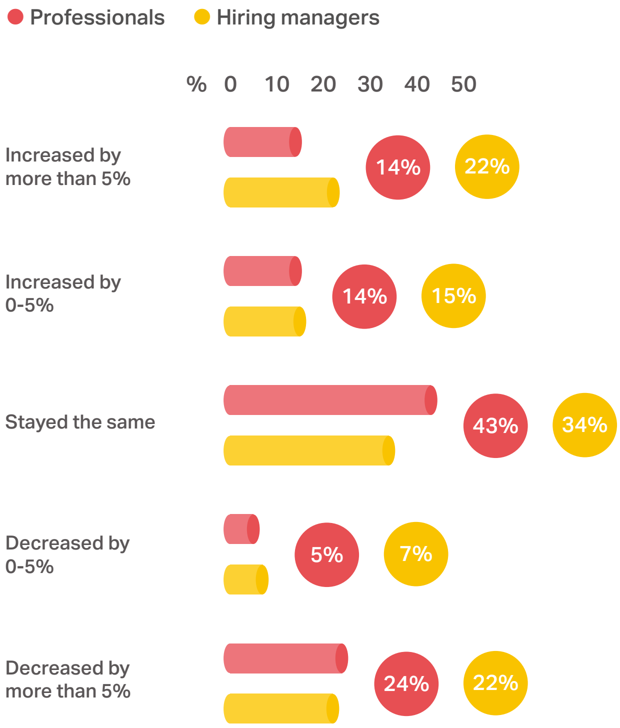
	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**73,525**	**59,093**	**90,067**	**56,464**	**72,234**	**50,167**	**59,916**	**98,614**
Accountant	45,822	36,699	55,415	34,209	50,515	29,200	39,566	62,922
Administrator	22,050	19,280	26,549	16,013	24,065	18,900	19,275	29,269
Chemical Engineer	76,692	58,644	82,529	50,718	64,732	39,800	48,634	102,254
Civil Engineer	54,190	44,472	67,372	40,385	61,424	40,500	45,652	72,253
Commissioning Engineer	73,768	70,000	80,693	66,043	75,455	39,500	57,128	87,851
Construction Engineer	84,000	65,137	106,272	79,668	68,000	38,000	58,285	116,639
Construction Manager	83,046	70,968	102,151	61,587	80,920	54,300	70,669	109,631
Contracts Manager	55,728	46,570	76,800	56,640	68,639	50,500	57,218	77,952
Drilling Engineer	82,778	68,887	101,794	61,698	80,807	64,800	70,687	110,902
Drilling Supervisor	125,413	94,177	157,138	95,342	112,084	99,800	91,000	170,276
Electrical Engineer	70,804	54,589	95,010	52,859	75,517	53,500	58,889	103,132
Finance Manager	77,961	65,348	82,511	63,530	73,254	62,500	71,501	105,983
Geophysicist	82,951	61,397	96,780	57,023	86,306	62,300	74,845	101,841
HSE Manager	72,191	59,440	91,681	56,640	81,062	48,500	58,198	97,136
Inspection Engineer	69,819	70,000	88,502	57,930	62,148	54,283	55,761	98,155
Instrumentation Engineer	89,251	55,020	100,730	71,788	84,316	55,700	61,013	119,000
Maintenance Engineer	69,301	53,641	83,368	50,953	62,056	41,600	57,699	89,124
Mechanical Engineer	66,844	49,000	82,232	49,588	68,617	54,600	61,013	90,084
Process Engineer	77,100	63,518	102,789	57,681	77,625	46,800	65,318	107,800
Production Engineer	72,548	53,001	93,168	46,462	64,846	58,900	60,000	100,874
Project Engineer	80,189	65,933	91,712	59,883	76,277	42,800	67,812	106,933
Project Manager	78,675	66,040	96,944	77,880	83,347	51,300	70,349	103,874
QA/QC Inspector	66,807	58,289	87,468	43,898	58,276	43,700	48,657	96,000
Reservoir Engineer	91,639	88,714	106,860	68,414	80,022	67,800	103,719	122,184
Welder	68,558	38,559	95,196	34,769	85,540	34,600	25,000	83,289

CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**524**	**477**	**653**	**292**	**645**	**355**	**458**	**715**
Accountant	290	320	400	166	453	203	282	467
Administrator	80	131	154	60	190	142	100	221
Chemical Engineer	483	433	567	214	580	280	379	739
Civil Engineer	400	350	492	204	544	255	355	544
Commissioning Engineer	527	526	650	288	667	266	441	647
Construction Engineer	560	500	743	279	612	295	432	824
Construction Manager	700	600	800	389	726	392	534	799
Contracts Manager	600	450	560	350	625	420	448	584
Drilling Engineer	750	700	760	449	744	505	538	818
Drilling Supervisor	925	950	1,142	698	1,005	880	693	1,232
Electrical Engineer	500	515	680	250	667	382	449	745
Finance Manager	514	500	596	422	656	470	515	772
Geophysicist	630	510	704	335	768	435	568	741
HSE Manager	515	550	652	363	713	315	448	698
Inspection Engineer	469	498	600	200	574	328	414	707
Instrumentation Engineer	577	426	706	304	735	390	466	856
Maintenance Engineer	550	415	592	256	563	220	434	670
Mechanical Engineer	489	384	650	212	617	380	463	661
Process Engineer	526	484	750	211	693	320	491	784
Production Engineer	456	399	676	232	595	455	447	736
Project Engineer	536	500	662	297	688	290	511	774
Project Manager	637	511	712	412	753	355	538	751
QA/QC Inspector	505	455	619	121	537	260	390	700
Reservoir Engineer	602	550	779	438	726	430	763	879
Welder	275	269	683	160	695	210	340	520

Furthermore, 19 per cent expect to see a further reduction in pay in 2021, including 13 per cent who expect that reduction to be more than five per cent.

PAY CHANGES IN THE LAST 12 MONTHS



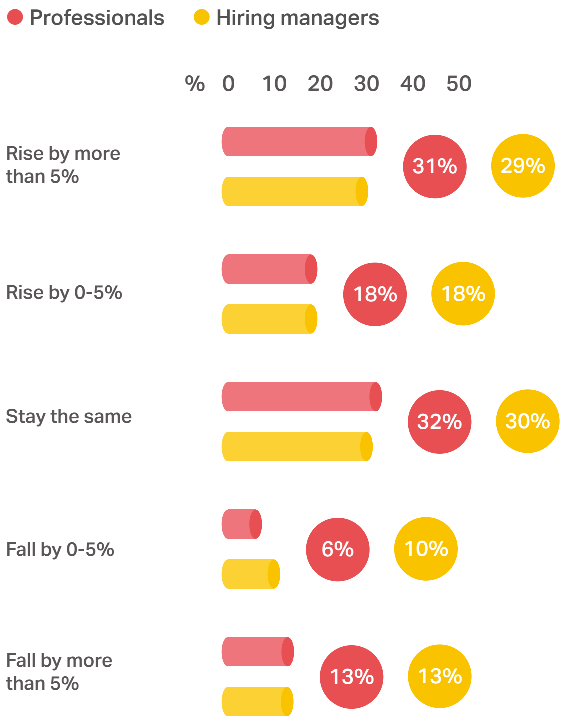
Hiring managers tended to see slightly more positive movement than individuals reporting on their own salaries. Nonetheless, the 37 per cent who report pay increases this year is down from 50 per cent last year. The number of hiring managers who report salary cuts this year has also increased.

29%

of professionals saw a fall in pay this year, with 24 per cent reporting cuts of more than five per cent.

Of course, salaries in the oil and gas sector are tied to the oil price and in a year of extreme demand shocks, negative prices and global economic uncertainty the fall in salary comes as no surprise.

PAY EXPECTATIONS FOR THE NEXT 12 MONTHS



"There's no denying it's been a tough year for oil and gas workers," says Janette Marx, CEO of Airswift. "The industry was fighting a war on two fronts – the oil price and the pandemic. We saw lay-offs and reductions in pay rates, and also in associated benefits. So, overall packages are thinner than they were last year, and that's inevitably reflected in this year's report."

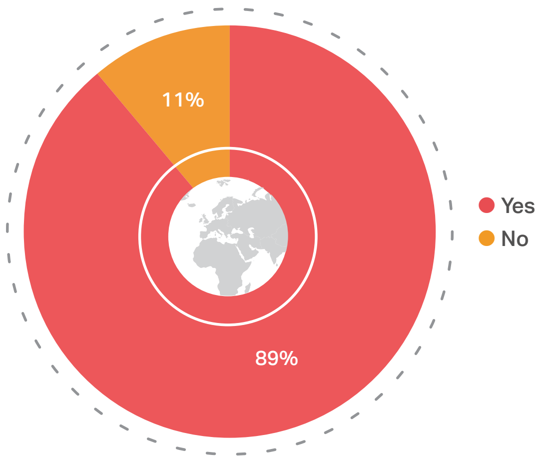
> *"There's no denying it's been a tough year for oil and gas workers. The industry was fighting a war on two fronts – the oil price and the pandemic."*
>
> *– Janette Marx*

In spite of all this, there remains discernible optimism in the sector. Forty-nine per cent of professionals and 47 per cent of hiring managers expect salaries to rise in 2021, although, again, this is far fewer than last year.

3. GLOBAL MOBILITY

The oil and gas sector in 2020 remains a mobile industry – in expectation if not in actual experience. Nearly nine in ten professionals would consider relocating to another region, with 42 per cent giving career progression as their main reason.

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



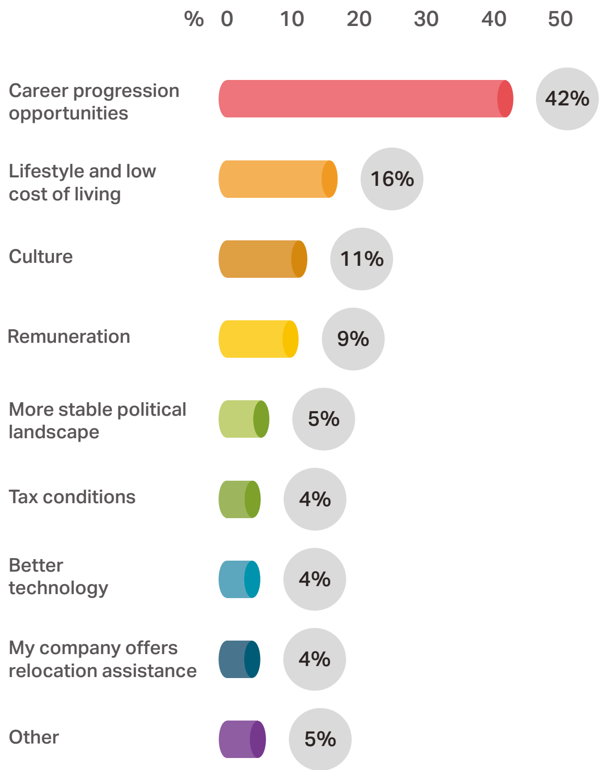
However, the Middle East no longer tops the wish-list of preferred destinations. Europe has pushed it into second place with Asia in third.

Although the tensions of early 2020 are a factor, there is more going on as Josh Young, Director of Energy Jobline, points out: "Local content programmes have been developing for some time and they are starting to bear fruit. We fully expect Europe and Asia to follow suit – especially with the heightened risk of borders closing and stranding workers."

Also notable is the low number of professionals (nine per cent) who say remuneration is a reason to re-locate. Culture, cited by 11 per cent, is now more important.

Lifestyle and low cost of living (16 per cent) is also more popular and may account for some of the changes in preferred destination. Young elaborates: "Those expats who previously enjoyed tax-free salaries, are now facing income taxes, VAT and social security contributions. For them, the financial incentive of a Middle East posting is not as strong as it once was."

WHAT IS YOUR MAIN REASON FOR BEING ATTRACTED TO A NEW LOCATION?



As for those who do wish to stay where they are, family issues remain the priority. Nearly half (47 per cent) say that remaining close to family members is their reason to stay put, while 13 per cent put it down to their children's education.

"There's a clear trend here," says Marx. "People are telling us, directly and indirectly, that remuneration is no longer the key consideration. Career progression matters but so too does lifestyle and staying closer to family and friends. This has implications for the way we recruit and retain talent throughout the sector."

4. AN UNCERTAIN FUTURE?

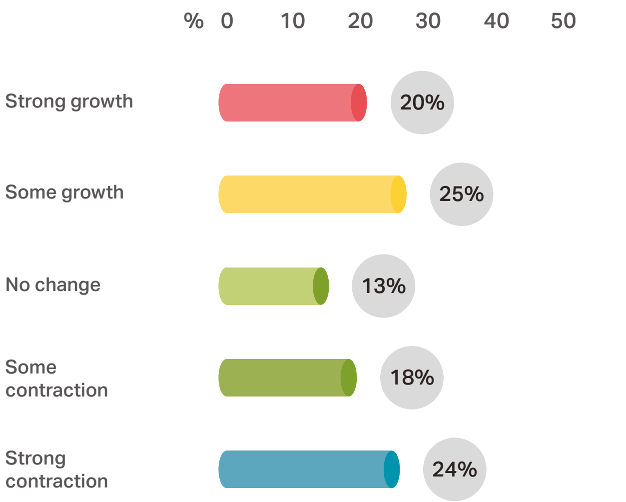
Inevitably, the events of 2020 have created a sense of uncertainty about what comes next. Approximately four in ten respondents think the sector has contracted over the past year and, of those, 57 per cent feel it has been a strong contraction.

42%

of respondents believe that the sector has contracted over the past year. Forty-five per cent think it has grown.

That still leaves 45 per cent who feel that it has grown. It may be that increased merger and acquisition activity and renewable energy pivot announcements from oil majors have created a strong impression of expansion and momentum.

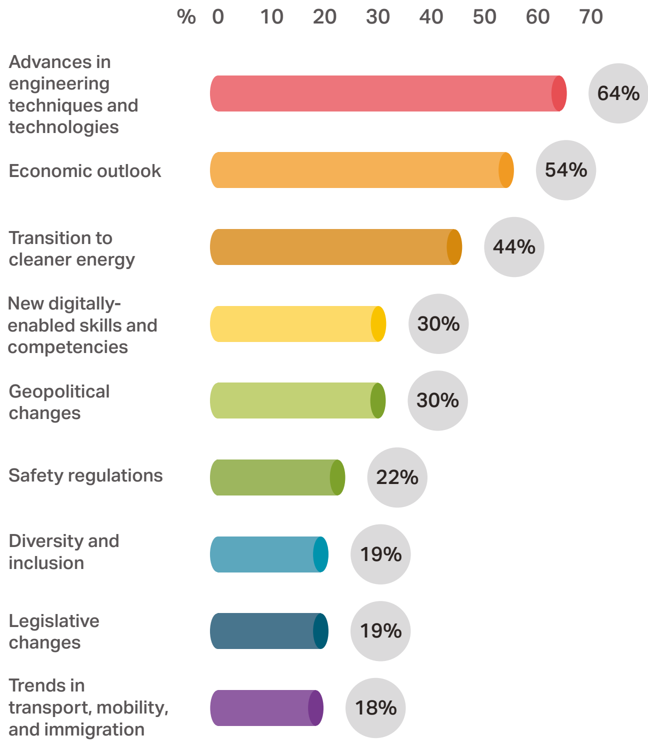
HOW STRONGLY HAS YOUR SECTOR GROWN OR CONTRACTED OVER THE PAST YEAR?



There is also plenty of hope for the future – especially in the medium term. Sixty-four per cent expect the sector to grow over the next three years, with 27 per cent saying that growth will be strong.

Young suggests that this positive view can be related to streamlining efforts throughout the sector: "Overall efficiency efforts and new technologies ensure more projects will be commercially viable once demand picks up. Advances in the past 12 months alone show the sector is continuing to innovate, so it's not surprising that so many respondents believe the biggest opportunities come from advances in engineering techniques and technologies, or digitally enabled skills and competencies."

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT OPPORTUNITIES FACING YOUR SECTOR OVER THE NEXT THREE YEARS?



"In a deep crisis, like pre-vaccine COVID-19, the largest concerns can be flipped into major opportunities if managed correctly."

– Josh Young

As for the challenges over the next three years, COVID-19 and the wider economic outlook come top of the list, as expected. However, 36 per cent also cite the availability of capital, which, given the distance between many professionals and the finance department, is tellingly high.

36%

of respondents think the availability of capital is among the most important challenges facing the sector over the next three years.

"From our observations and conversations throughout the industry, this is the biggest issue of all," says Marx. "We see investors looking to their own reputations, and diverting capital to renewables, for example, rather than the oil and gas sector. Financing is going to get tougher."

"We see investors looking to their own reputations, and diverting capital to renewables, for example, rather than the oil and gas sector. Financing is going to get tougher."

– Janette Marx

"Advances in the past 12 months alone show the sector is continuing to innovate, so it's not surprising that so many respondents believe the biggest opportunities come from advances in engineering techniques and technologies, or digitally enabled skills and competencies."

– Josh Young

Interestingly, many of the issues that are seen as challenges are also regarded as opportunities. For example, the transition to cleaner energy is a challenge for 33 per cent but an opportunity for 44 per cent of respondents. Similarly, geopolitical change is a challenge for 26 per cent and an opportunity for 30 per cent.

"This shows us a sector that is ready to turn its concerns into something more productive. In a deep crisis, like pre-vaccine COVID-19, the largest concerns can be flipped into major opportunities if managed correctly," says Young.

33%

of respondents view the transition to cleaner energy as a challenge for the sector, while 44 per cent consider it an opportunity.

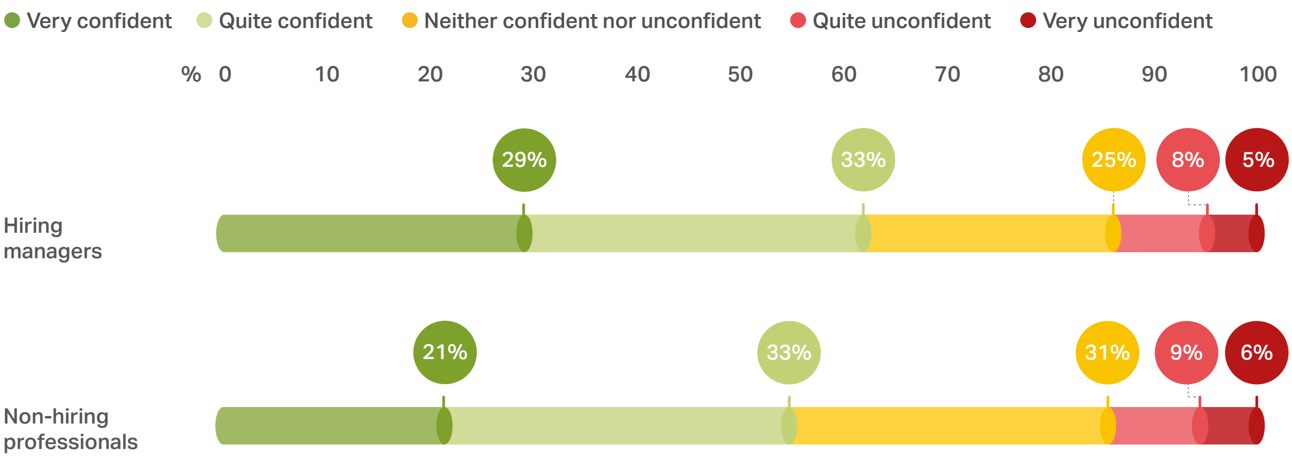
5. BUILDING RESILIENCE

Respondents are generally confident about their firm's ability to withstand these challenges. In fact, 57 per cent say that their employer is resilient both to recent and future changes, including 24 per cent who are very confident. Only 14 per cent are not confident about the resilience of their organisation.

57%

of respondents are confident that their firm is resilient to the challenges it faces.

HOW CONFIDENT ARE YOU THAT YOUR EMPLOYER IS RESILIENT TO THE CHANGES IT HAS FACED AND WILL FACE IN THE FUTURE?



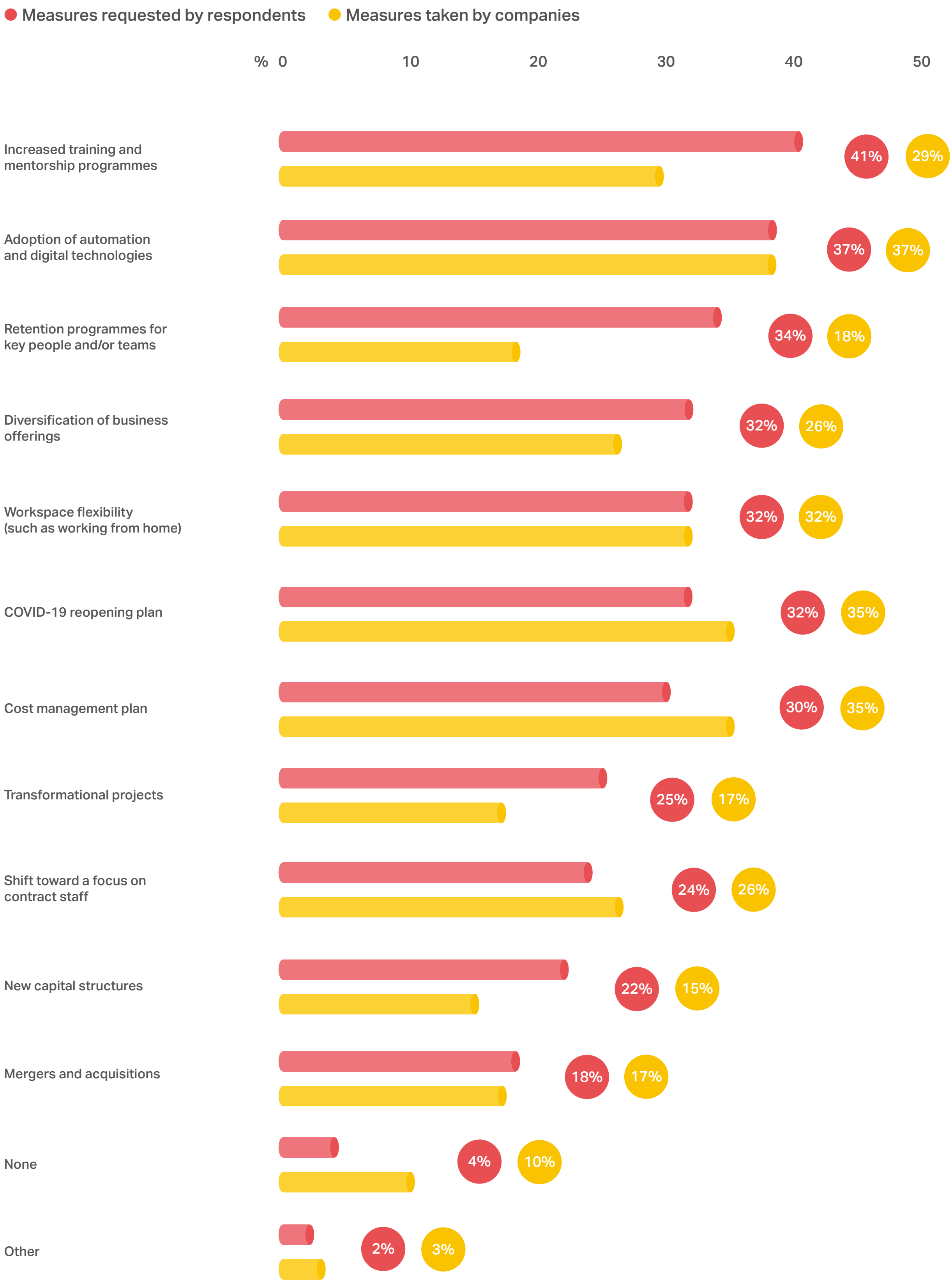
Confidence levels tend to be much higher among hiring managers: 62 per cent of hiring managers are confident and 29 per cent very confident, against 53 per cent and 21 per cent of professionals. Again, this can be seen as good news: after all, hiring managers have a seat at the table when the company's future is discussed. They have also have a wider view on how the cyclic nature of oil and gas has created and built resilience.

So, how do employers build resilience into the business? For 41 per cent of respondents the answer lies in increased training and mentorship. This is to be expected. Employees are always receptive to more formal training programmes, and as career stability and progression become increasingly valued, training, development and mentorship become even more important.

This is not necessarily in line with what companies are actually doing. The primary area where employers and employees are on the same page is around the adoption of automation and digital technologies. Elsewhere, only 29 per cent report an increase in training and mentorship provision from employers. And although 34 per cent of employees believe retention programmes are essential for resilience, only 18 per cent believe their employer offers such programmes. It is hard to say whether this represents an actual gap in provision, or a perceived gap.

"Employees are often not aware of some of the more informal mentoring and development programmes that their employers have in place. There is a common thought process here: if it's not in a classroom or instructor led, it's not training. Companies need to ensure that their training schemes are well designed, widely available and relevant to the needs of their teams. Above all, they need to make sure they are well communicated and accessible," says Marx.

MEASURES RESPONDENTS WANT VS MEASURES COMPANIES ARE TAKING



6. A NEW NORMAL?

Is there a new normal on the horizon? According to this year's survey, the answer is a resounding yes. Nearly nine in ten believe that the events of 2020 will result in a new normal for the sector, while 46 per cent say that the new normal is already here in the form of social distancing, workspace flexibility and reduced headcount.

54%

say the transition to cleaner energy has accelerated over the past 12 months.

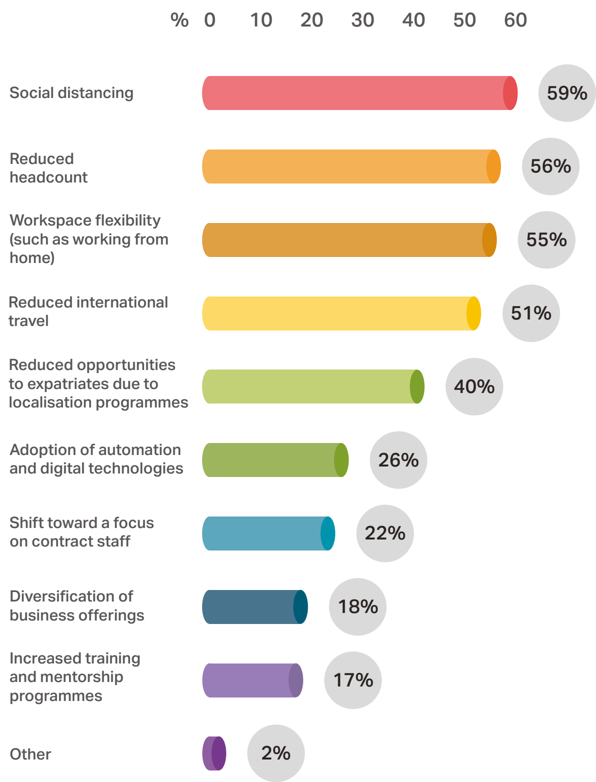
The pandemic response has shown to even the most sceptical that remote working – both for office-based staff and on-site professionals – is possible and often desirable. The question is whether this new normal will extend into late 2021 and beyond. Much will depend on when a vaccine becomes readily available and how companies respond.

"The widespread belief in the sector is that contractors come with very specific expertise and therefore require less training. Added to this is the fact that contractors give operators the flexibility to change direction rapidly."

– Janette Marx

Professionals also expect to see some impact on their opportunities for global mobility, with 51 per cent anticipating reduced international travel and 40 per cent expecting local content programmes to eat away at opportunities for expatriates. And although 17 per cent believe that there will be an increase in training and mentorship programmes, 22 per cent think the focus will be on ever more contract staff.

WHAT IS THE NEW NORMAL FOR YOUR SECTOR?



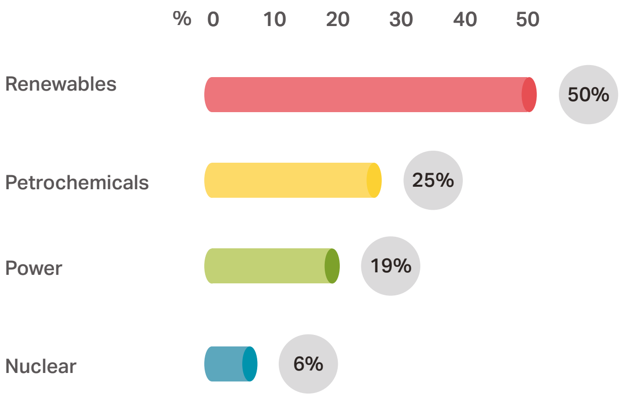
The result is not that surprising, according to Marx: "The widespread belief in the sector is that contractors come with very specific expertise and therefore require less training. Added to this is the fact that contractors give operators the flexibility to change direction rapidly."

While all this is going on, the transition to cleaner energy continues. Fifty-four per cent say that it has accelerated over the past 12 months, while 36 per cent say that progress has continued at the same pace. Only ten per cent report a deceleration or regression in the progress of the energy transition.

7. ATTRACTING AND RETAINING TALENT

Attracting and retaining talent remains a major, and increasing, concern. Sixty per cent of respondents are worried about an impending talent crisis – up from 48 per cent just two years ago. A quarter now describe themselves as very worried.

IF YOU WOULD CONSIDER SWITCHING SECTORS, WHICH SECTOR WOULD YOU BE MOST INTERESTED IN SWITCHING TO?



Seventy-nine per cent would consider switching to another sector within in the next three years – up from 73 per cent a year ago.

Again, career progression is the primary motivator: 35 per cent say this is the main driver, followed by interest in the wider industry (19 per cent) and innovation (14 per cent).

"When professionals are asked about the industry as a whole, they tend to be more positive. But when asked to consider their own future, greater levels of uncertainty emerge."

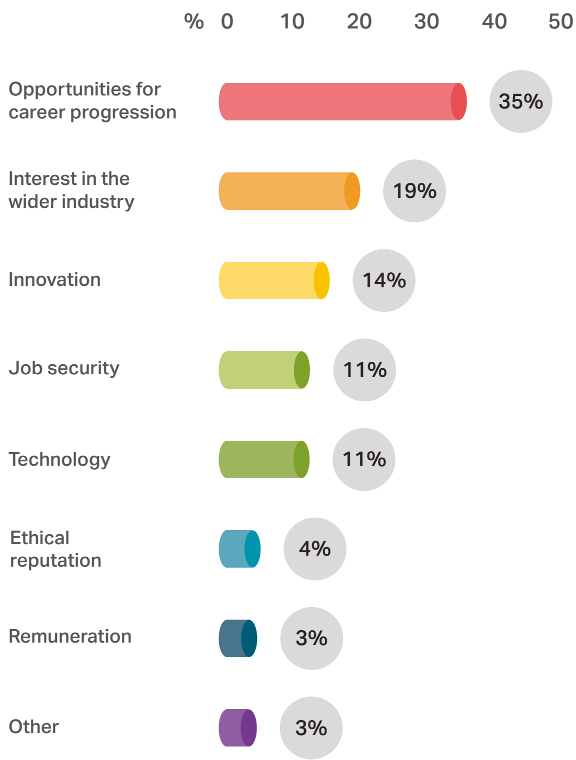
– Janette Marx

Since so many oil and gas workers have observed an acceleration in the energy transition, it is not surprising that the renewables sector is the most popular destination. Fifty per cent would choose it, up from 43 per cent last year. The next most popular choice – petrochemicals – is notably less popular than it was a year ago.

79%

of respondents would consider switching to another sector in the next three years, with renewables the most popular destination.

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



This sense of restlessness is probably also a result of decreased job security, primarily because of COVID-19. Seventy-eight per cent report feeling less secure than a year ago, with 66 per cent of those blaming the pandemic. Their worries are shared by hiring managers, 77 per cent of whom think their employees' jobs are less secure than they were last year.

"This is a bright red warning flag. Especially for an industry with an acknowledged skills gap, a potential talent shortage, and emerging rival sectors like renewables. This is a trend that the entire sector should be looking at."

– Josh Young

This is a very different picture from the optimism around future pay and sector expansion. This is likely to be the difference between macro and micro issues, according to Marx. "When professionals are asked about the industry as a whole, they tend to be more positive. But when asked to consider their own future, greater levels of uncertainty emerge."

78%

of respondents feel less secure in their jobs than they did a year ago.

The more worrying number is the 56 per cent who say that, were they to enter the workforce now, they would pursue a career in the oil and gas sector. That is a marked drop from the 67 per cent who said the same two years ago.

There is a similar pattern among younger respondents (up to 24 years old): 73 percent would enter the sector now compared to 81 per cent previously. Among older respondents (55 years and above) the fall is even more dramatic. Just 46 per cent say they would enter the sector today.

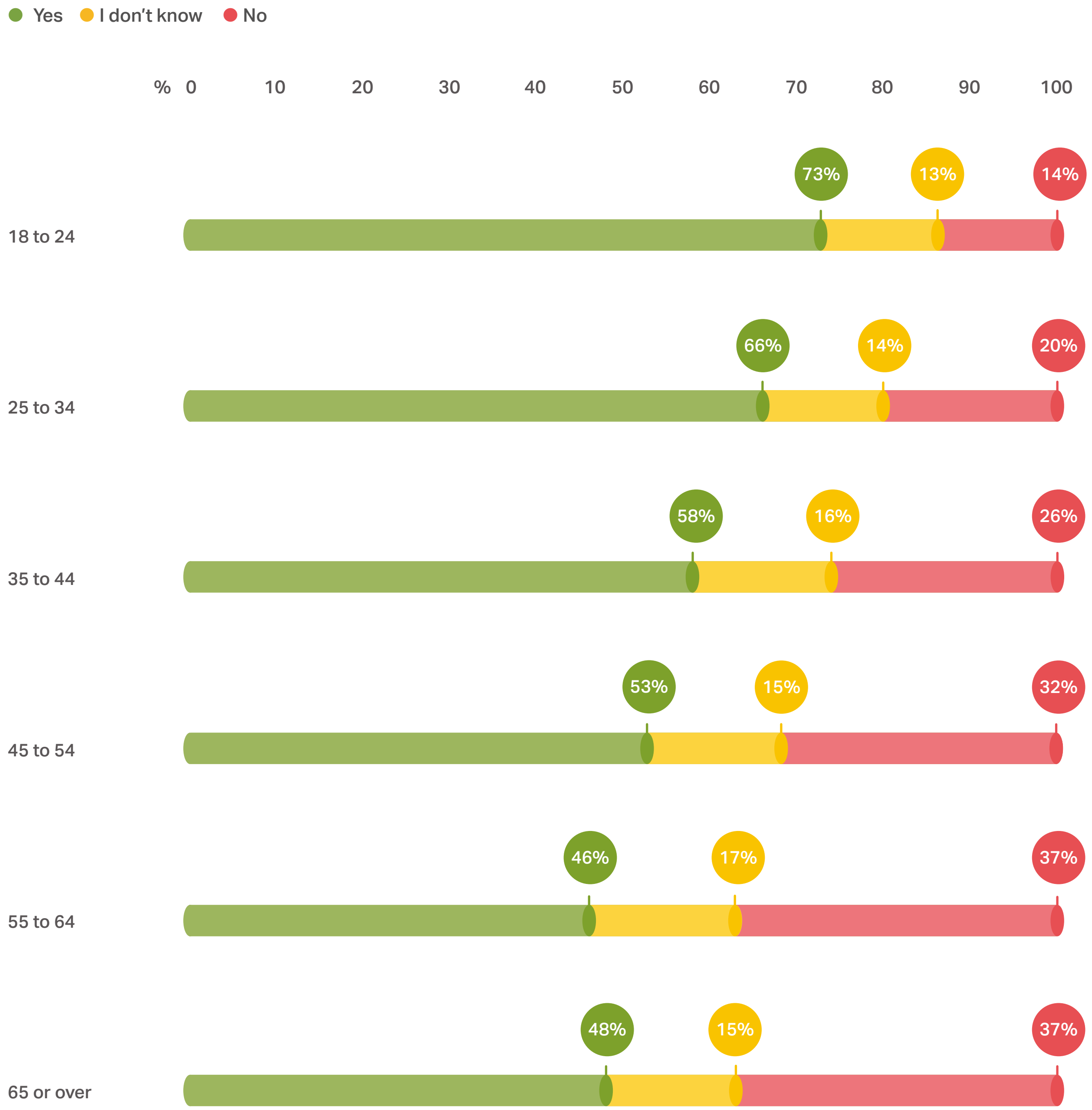
"This is a bright red warning flag," Young says. "Especially for an industry with an acknowledged skills gap, a potential talent shortage, and emerging rival sectors like renewables. This is a trend that the entire sector should be looking at."

Marx concludes: "The oil and gas sector isn't alone in facing an uncertain future, and plenty of work is being done throughout the energy value chain to mitigate some of the more extreme risks reflected in this year's report. But when it comes to building confidence, communication is key. The sector needs to show its commitment to innovation, its commitment to people, and its support for environmental measures – and ensure that investors, employees, candidates and prospects all hear the message."

"When it comes to building confidence, communication is key. The sector needs to show its commitment to innovation, its commitment to people, and its support for environmental measures."

– Janette Marx

IF YOU WERE ENTERING THE INDUSTRY NOW, WOULD YOU PURSUE A CAREER IN YOUR SECTOR?



Summary Oil and Gas

In last year's GETI report, we noted that the oil and gas sector continued to gain in confidence and momentum as it shook off the last symptoms of the downturn. Then came the novel coronavirus, stalling that momentum almost overnight. Inevitably, the global pandemic – pre-vaccine at the time of writing – features heavily in the survey results and has implications for salary, sector growth and job security. Uncertainty and doubt have increased, but optimism still lingers, and behind the pandemic are longer-term opportunities, and challenges, for the sector and the individuals working in it.

GETI
Global Energy Talent Index

airswift
TRUSTED WORLDWIDE
energyjobline


GAS

Petrochemicals

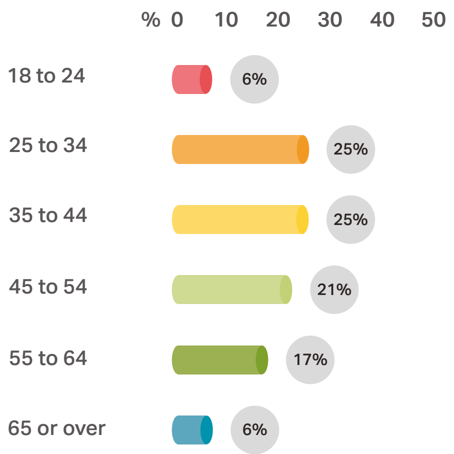
Contents: Petrochemicals

Petrochemicals

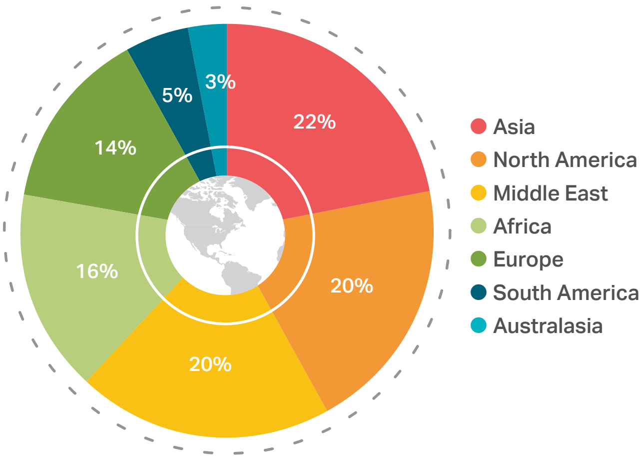
If there is a single phrase to sum up the petrochemicals sector's experience over the past year, it is 'mixed fortunes'. The diversity within downstream and refining operations is reflected in the response to the pandemic, which has led to a variety of views on pay, future prospects, and even the nature of a potential new normal.

1. DEMOGRAPHICS

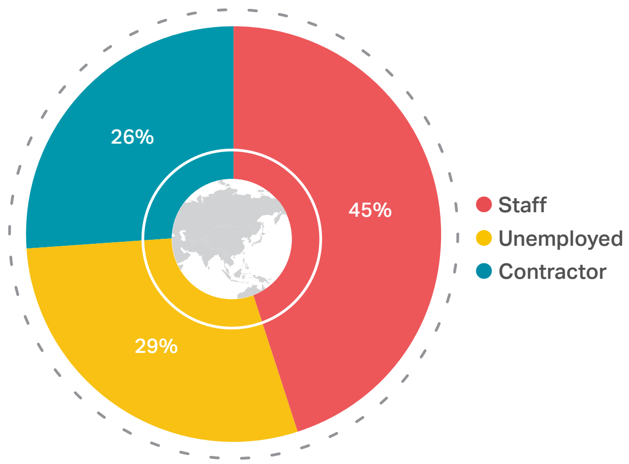
AGE



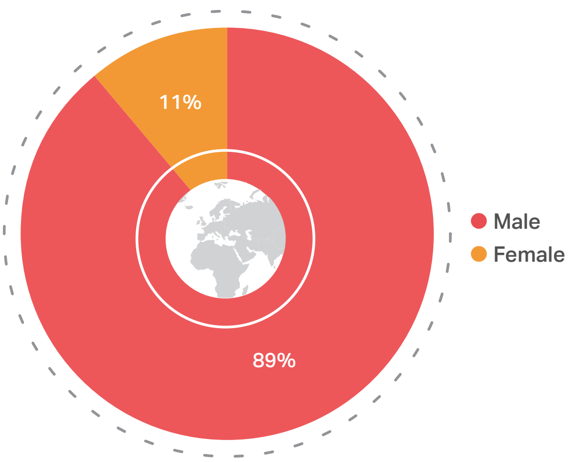
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

Despite some fairly major swings in fortune, more respondents in the petrochemicals sector reported a pay increase than a decrease this year, unlike their upstream colleagues. Nonetheless, sector pay was much less buoyant than last year. Thirty-seven per cent disclosed that they received a pay increase in 2020, with 18 per cent seeing a rise of more than five per cent. This compares to 55 per cent and 25 per cent, respectively, in 2019.

PERMANENT WORKER ANNUAL SALARY, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**55,453**	**48,064**	**68,620**	**47,666**	**56,144**	**38,426**	**48,162**	**77,051**
Administrator	21,119	18,638	25,511	15,464	24,551	18,900	17,954	28,158
Chemical Engineer	62,637	53,024	74,711	43,759	60,825	37,600	51,869	87,239
Chemist	45,356	47,261	57,569	33,861	54,277	29,300	45,535	63,287
Construction Manager	76,174	63,717	93,134	56,681	72,672	46,500	65,188	101,210
Electrical Engineer	65,613	53,795	82,900	48,984	69,268	44,800	55,497	94,167
Environmental Manager	59,540	48,477	71,633	46,589	42,124	32,800	50,336	83,244
Finance Manager	70,325	59,376	81,637	70,589	67,272	48,700	62,442	96,280
Health and Safety Manager	46,604	45,798	61,312	56,471	55,051	31,500	45,284	66,134
HR Manager	42,905	35,313	46,414	50,824	45,184	34,500	39,769	56,315
Lab Manager	32,000	37,046	44,956	50,824	42,064	33,400	32,722	44,300
Maintenance Technician	38,198	34,683	54,985	29,507	40,927	26,500	32,011	54,467
Mechanical Engineer	64,415	49,391	79,418	48,188	66,070	44,500	59,094	89,459
Office Manager	47,721	37,586	55,541	35,814	46,850	36,400	38,651	65,679
Planner/Scheduler	61,413	48,563	74,210	45,849	49,629	38,000	51,644	82,434
Process Engineer	74,358	60,487	96,657	60,939	78,619	44,320	66,726	108,546
Process Operations Production Manager	49,887	49,901	68,556	70,589	53,083	37,000	50,978	80,000
Project Coordinator	60,785	47,464	68,958	43,565	51,942	28,900	40,000	81,046
Purchasing Manager	52,810	57,395	68,490	42,353	66,004	36,700	49,418	73,574
QA/QC Manager	72,248	61,396	85,212	53,976	68,713	68,700	58,114	96,467
Technical Engineer	64,955	51,968	80,598	48,493	67,754	49,500	50,000	89,023

CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**341**	**361**	**476**	**259**	**414**	**258**	**362**	**564**
Administrator	61	122	148	42	199	135	97	213
Chemical Engineer	403	387	507	268	449	244	392	646
Chemist	258	357	397	212	393	198	350	475
Construction Manager	511	454	645	286	543	298	491	728
Electrical Engineer	411	385	561	308	500	289	415	683
Environmental Manager	360	354	495	203	330	190	372	605
Finance Manager	448	438	559	295	497	325	465	700
Health and Safety Manager	321	339	452	236	419	220	358	501
HR Manager	291	450	327	212	360	245	321	431
Lab Manager	225	284	340	212	328	260	271	357
Maintenance Technician	242	251	349	203	322	155	242	380
Mechanical Engineer	420	366	574	316	473	305	432	664
Office Manager	257	277	369	230	303	267	269	460
Planner/Scheduler	299	344	508	271	343	188	382	572
Process Engineer	367	421	695	347	568	318	471	798
Process Operations Production Manager	334	373	502	295	397	263	394	614
Project Coordinator	375	361	489	294	386	190	295	565
Purchasing Manager	344	423	499	209	470	255	383	537
QA/QC Manager	453	480	579	386	511	490	423	717
Technical Engineer	430	345	528	346	483	318	424	632

56%

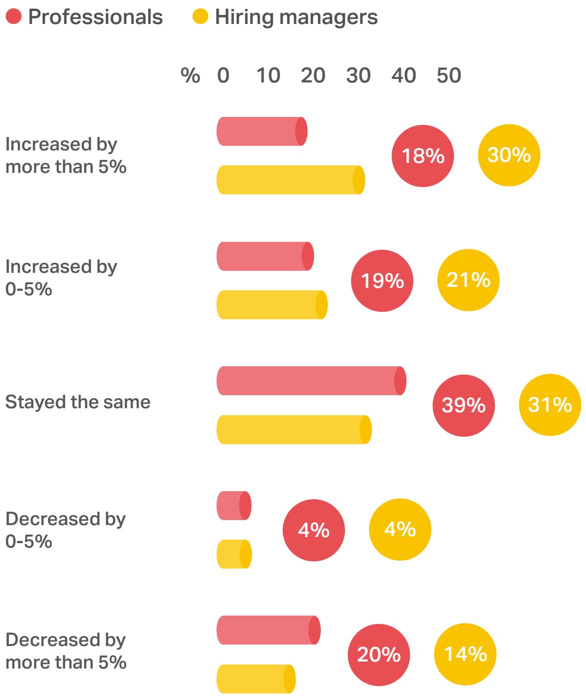
of professionals still expect a pay increase next year.

37%

of professionals disclosed that they received a pay increase in 2020.

The number of respondents reporting a reduction in pay (24 per cent) has also gone up since last year (10 per cent). Notably, 20 per cent say pay has fallen by more than five per cent. That's significantly more than the seven per cent who reported a similar cut last year.

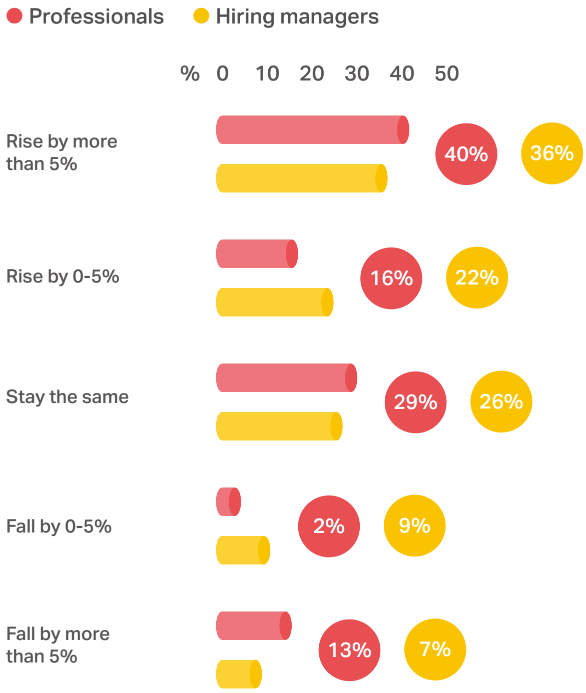
PAY CHANGES IN THE LAST 12 MONTHS



Since petrochemicals' salaries are only loosely correlated with the oil price, this is almost entirely down to the impact of COVID-19. As Josh Young, Director of Energy Jobline, says: "Demand for certain petrochemical products has massively dropped off, and that has really affected these companies. They've been reducing costs and cutting back where possible – and that obviously includes salaries."

This situation has taken a toll on optimism. Although 56 per cent of professionals still expect a pay increase next year, it was 70 per cent last year. Tellingly, an almost identical number of hiring managers say the same. Fifty-eight per cent of managers anticipate pay to rise, down from 70 per cent last year – suggesting that professionals' views of their own prospects are very realistic. Overall, 15 per cent of all respondents expect to see a reduction in pay – up from just four per cent last year.

PAY EXPECTATIONS FOR THE NEXT 12 MONTHS



Janette Marx, CEO of Airswift, notes that the sector has employed a number of measures to protect jobs, which have had consequences for pay. "We've seen companies reduce hours and introduce shorter weeks before pay cuts came in. It's not clear how long those pay cuts will now last – it is almost entirely dependent on the public health situation. When that improves, we can expect salaries and day rates to return to previous levels."

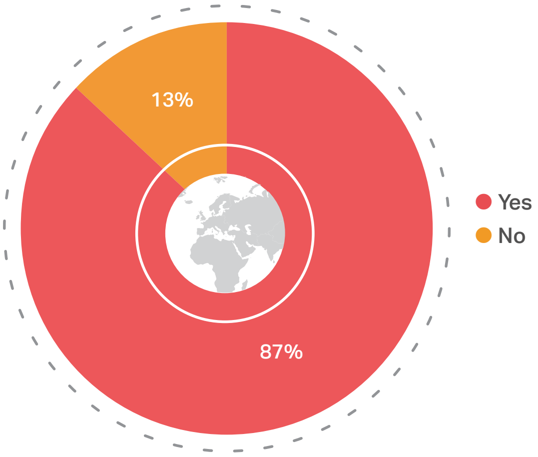
"Demand for certain petrochemical products has massively dropped off, and that has really affected these companies. They've been reducing costs and cutting back where possible – and that obviously includes salaries."

– Josh Young

3. GLOBAL MOBILITY

Holding steady from last year is the number of professionals (87 per cent) who would consider relocating to another region for work. Nearly half (49 per cent) say their employers provide cross-regional job transfers, while 17 per cent say relocation opportunities aren't on offer. Career progression is the main reason to move, significantly ahead of lifestyle, cost of living and cultural factors.

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



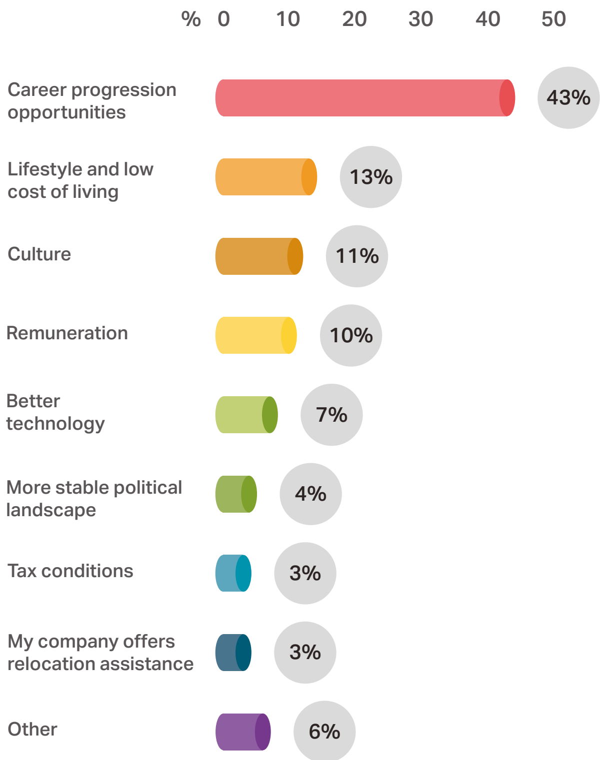
However, there has been movement among preferred destinations. Three years ago, North America and Asia led the way: this year Europe tops the list as the preferred destination of 25 per cent of respondents. The Middle East was the second most popular choice, but only 19 per cent would now consider moving there, compared to 31 per cent two years ago.

87%

of respondents would consider relocating to another region for work.

"Global mobility is affected by macro geopolitical issues as well as domestic situations," says Marx. "There's been plenty of tension and instability on both fronts in the past year or two. This will impact the way people consider where they want to work."

WHAT IS YOUR MAIN REASON FOR BEING ATTRACTED TO A NEW LOCATION?



Although family issues are the strongest factor keeping respondents tied to their current location, that has weakened slightly since last year.

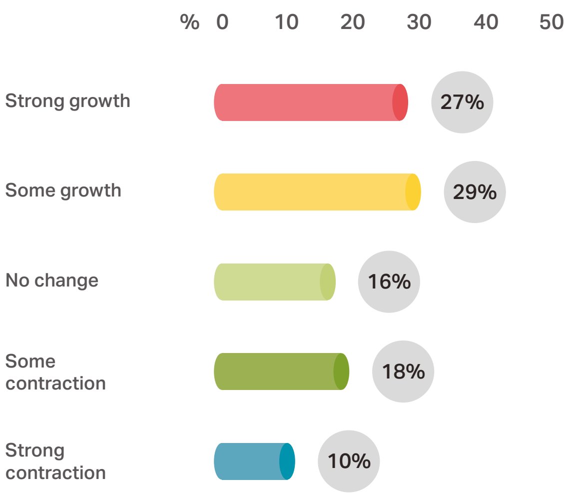
"This looks like a very pragmatic response to an uncertain pay situation," says Josh Young. "Remuneration has declined as a driver of global mobility over the years, while lifestyle and culture have increased. The current pressure on salaries may lead to a temporary slow-down in the long-term trend."

4. AN UNCERTAIN FUTURE?

Despite the challenges, 56 per cent of respondents think their sector has grown over the past year, rising to 64 per cent among hiring managers. In addition, 66 per cent of professionals and 72 per cent of hiring managers expect the sector to grow over the next three years, including 32 per cent who expect strong growth.

Interestingly, 28 per cent think that the sector experienced strong growth this year – the same number who think it contracted.

HOW STRONGLY HAS YOUR SECTOR GROWN OR CONTRACTED OVER THE PAST YEAR?

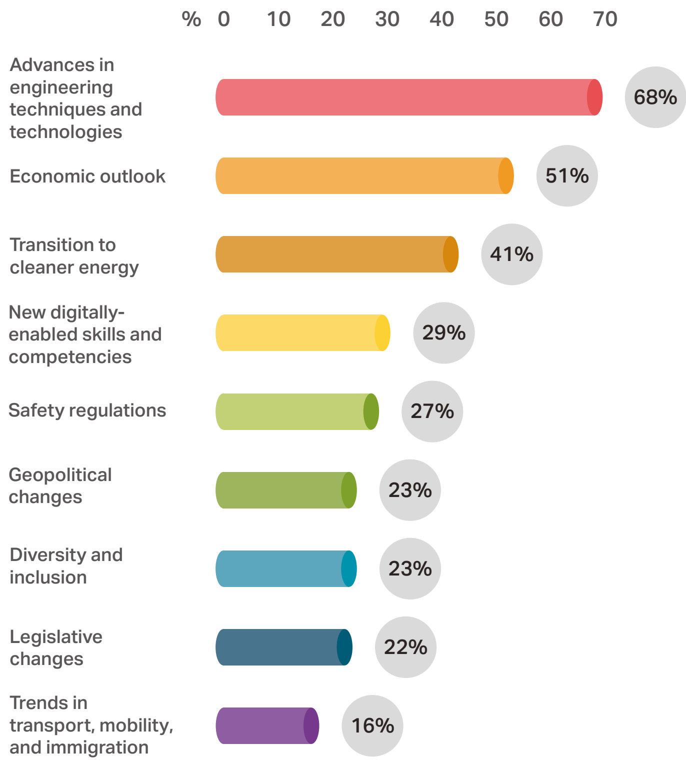


The optimism can largely be attributed to the diverse markets the world's petrochemical plants serve, says Marx: "Working for a plant producing plastics for PPE or chemicals for hand sanitiser has been a very different experience than serving less-essential markets. While we wait for a widely available vaccine, demand in many areas will continue to go up."

Certainly, the pandemic looms large in the minds of respondents. Sixty per cent believe it is the biggest challenge they face over the next three years, followed by 52 per cent who flagged the wider – but inevitably related – economic outlook.

As for the biggest opportunities, advances in engineering techniques and technologies is by far the most common choice, cited by 68 per cent. For 51 per cent, the economic outlook is an opportunity, while 41 per cent see opportunities in the transition to cleaner energy.

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT OPPORTUNITIES FACING YOUR SECTOR OVER THE NEXT THREE YEARS?



"To some extent, this should be a future-proof sector," says Young. "We saw that when many plants were deemed essential during periods of lockdown. Even the energy transition creates new opportunities – like hydrogen refuelling stations to give just one example. So that confidence in the medium-term future feels justified, even if immediate concerns have created some sector-wide anxieties."

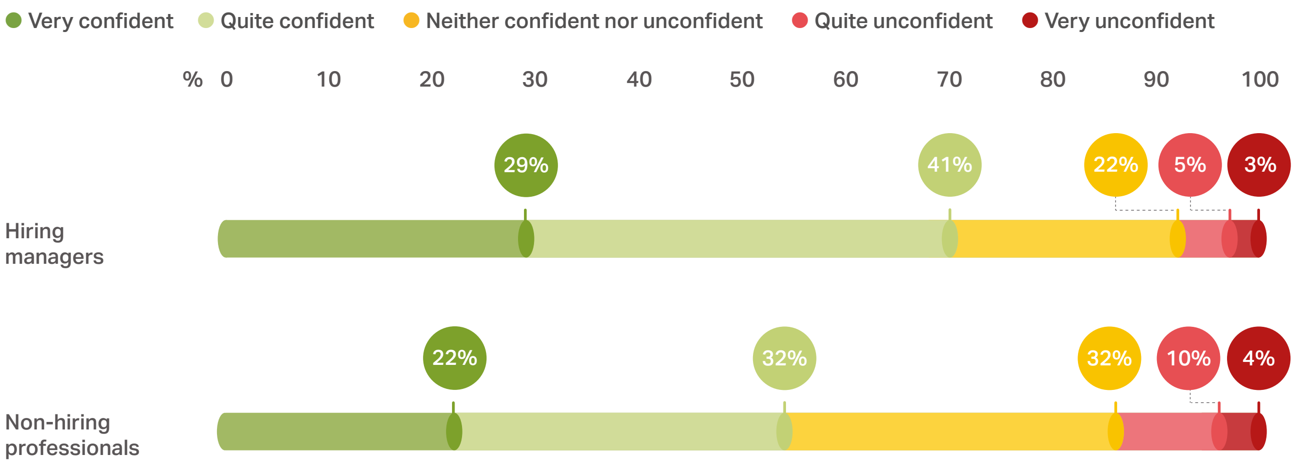
5. BUILDING RESILIENCE

Of course, creating a more certain future depends on creating resilience. Respondents are, on the whole, confident that their firm is doing just that. Sixty-one per cent say their employer is resilient to the changes it has already faced and those it will face in future. Twenty-five per cent are very confident. As before, hiring managers are somewhat more confident than professionals at 70 per cent and 29 per cent, respectively.

61%

of respondents are confident that their firm is resilient to the challenges it faces.

HOW CONFIDENT ARE YOU THAT YOUR EMPLOYER IS RESILIENT TO THE CHANGES IT HAS FACED AND WILL FACE IN THE FUTURE?



However, all but four per cent say more can be done. For example, 39 per cent say that employers should increase training and mentorship to build resilience into the business. In addition, 36 per cent say their firm should increase automation and adoption of digital technologies, and 35 per cent say COVID-19 reopening plans are needed.

"The message is clear: to build resilience, put employees front and centre."

– Janette Marx

This is largely in line with what companies have been doing. Forty-one per cent say their employer is adopting digital technologies and 36 per cent are seeing increased workplace flexibility. A further 35 per cent report cost-management plans, with 33 per cent saying the same about COVID-19 reopening plans.

But training and mentorship is still an outlier. Thirty-two per cent say these kinds of programmes are in place, which suggests that implementation of training schemes has not quite yet met demand.

"In a downturn, training and mentorship is typically viewed as a cost," says Marx. "So, it may be that a lot of training programmes were cut this year. But the message coming out from our survey is pretty clear: if you want to continue to build resilience, you need to put employees front and centre to accelerate your business and move it forward."

MEASURES RESPONDENTS WANT VS MEASURES COMPANIES ARE TAKING

6. A NEW NORMAL?

Although just under half of all respondents (48 per cent) believe that the sector has already reached a new normal after the events of 2020, 86 per cent believe that a new normal is still on its way. As to what that looks like, 61 per cent say it is socially distanced, 54 per cent say it involves workspace flexibility, and 52 per cent say it means a reduced headcount.

"Office-based corporate workers have enjoyed a great deal of flexibility. But plant workers are running a carefully calibrated process, and in those circumstances, workspace flexibility is going to be much harder to achieve – and will have far greater impact."

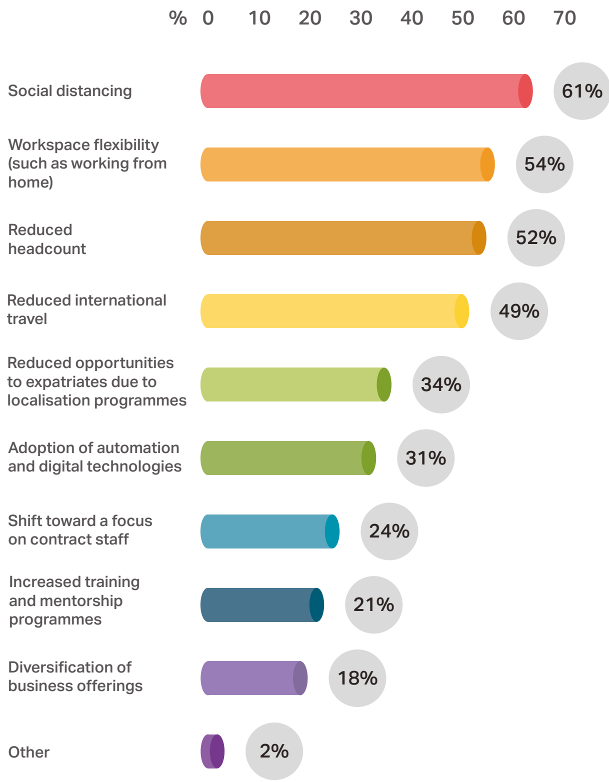
– Josh Young

As Young points out, however, these measures will look very different in different areas. "Office-based corporate workers have enjoyed a great deal of flexibility. But plant workers are running a carefully calibrated process, and in those circumstances, workspace flexibility is going to be much harder to achieve – and will have far greater impact."

86%

of respondents believe the sector will enter a new normal.

WHAT IS THE NEW NORMAL FOR YOUR SECTOR?



61%

of respondents believe social distancing is part of the new normal for petrochemicals.

As noted above, many respondents see opportunities in the renewables sector. It is perhaps not surprising that 54 per cent say that the energy transition has accelerated over the past year. A further 36 per cent say that it has progressed but at the same pace as before. Only seven per cent report a decelerating transition. It seems safe to assume that the energy transition – and all the opportunities and challenges that come with it – will be a key part of the new normal.

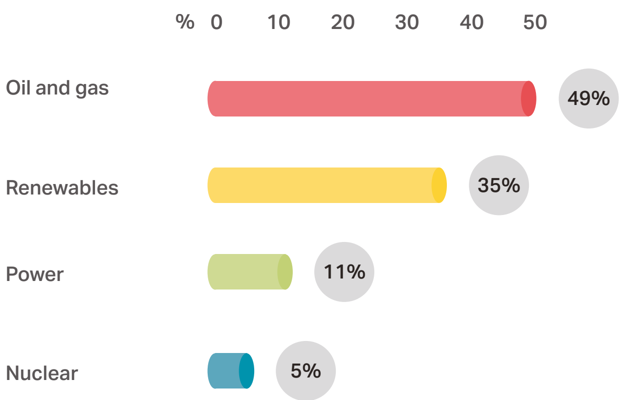
7. ATTRACTING AND RETAINING TALENT

A potential talent crisis looms large for our respondents. Fifty-seven per cent are worried about their future ability to fill essential roles, up from 47 per cent two years ago. Twenty-five per cent are very worried.

Concerns around training and mentorship are noted above, but this is not the only issue, says Marx. "Finding the right people is a constant worry throughout the industry. Attracting people who want to join and stay in the sector is one issue. But there are simply not enough people graduating in the STEM subjects. That's a problem for every company that depends on those graduates. And it's on all of us to address it."

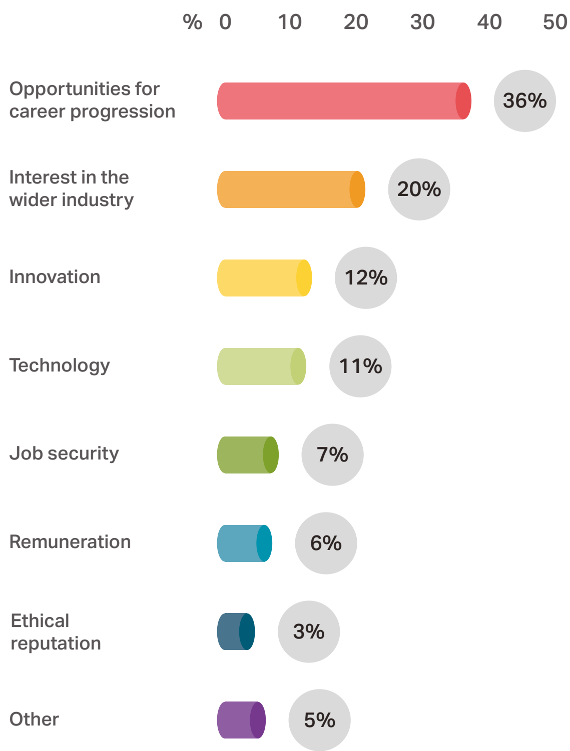
Concerns about the talent crisis could also be an acknowledgement of respondents' feelings about their own roles. A massive 82 per cent say they would consider switching to another sector in the next three years, with oil and gas preferred by 49 per cent – down from 58 per cent last year. Renewables is the destination of choice for 35 per cent – up from 27 per cent last year.

IF YOU WOULD CONSIDER SWITCHING SECTORS, WHICH SECTOR WOULD YOU BE MOST INTERESTED IN SWITCHING TO?



As with global mobility, opportunities for progression remain the primary reason to consider another sector, slightly down from last year (36 compared to 41 per cent). However, it still outnumbers the second reason – interest in the wider industry, cited by 20 per cent – by some margin.

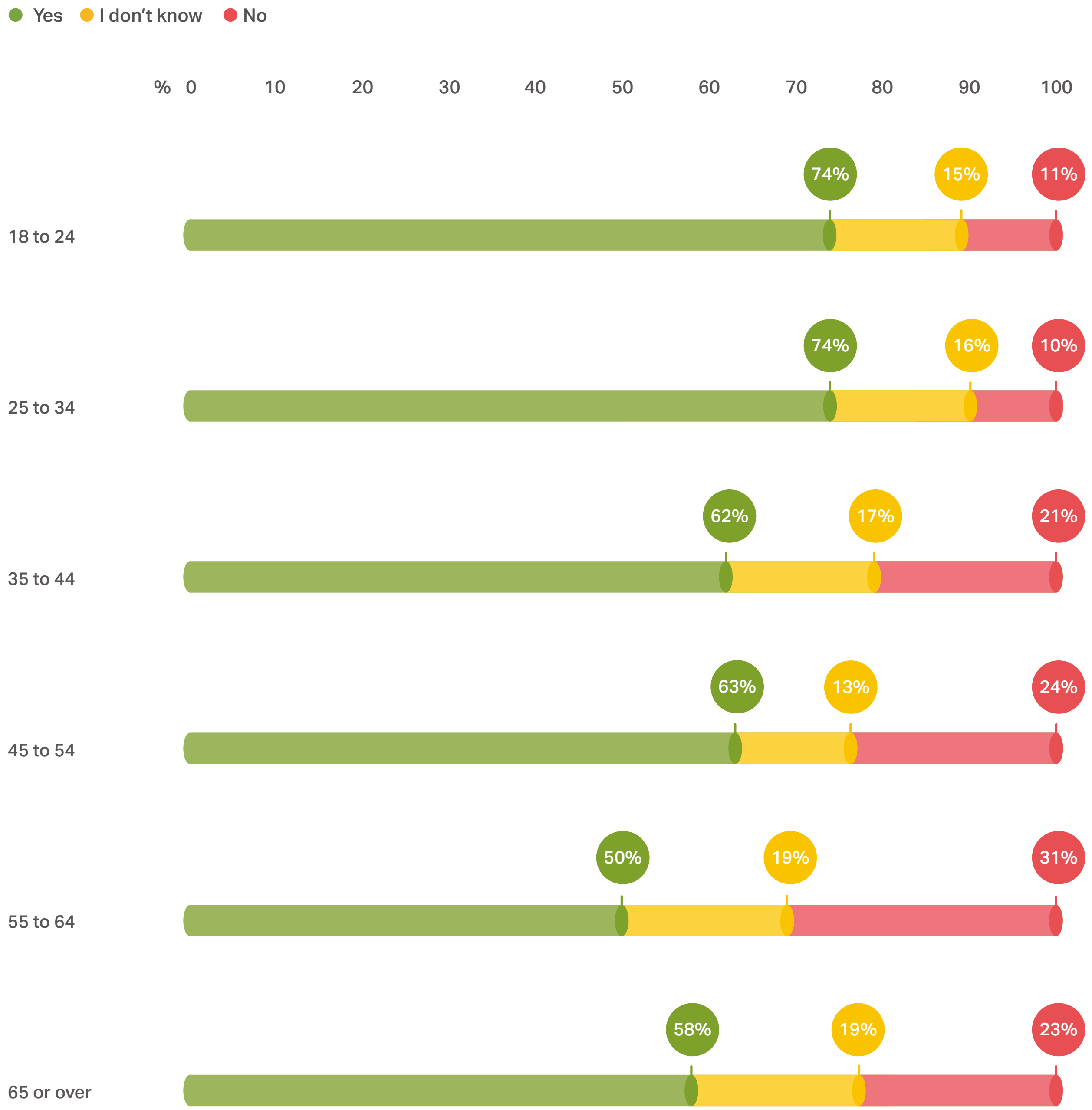
WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



All of this reflects the fact that 74 per cent of professionals feel less secure in their jobs than they did a year ago. Tellingly, 71 per cent of hiring managers agree. Furthermore, 63 per cent say that, were they entering the energy industry now, they would pursue a career in the petrochemicals sector. That's a fall from nearly 75 per cent two years ago. More worryingly still, if given their time again, 20 per cent would not join the petrochemicals sector at all.

"There are plenty of areas where skills cross over between the petrochemicals sector, oil and gas and renewables," points out Young. "All these sectors will be competing for talent among an unnerved workforce that wants career progression, innovative projects, and effective training – and will look to the sector that can deliver. Meeting those needs is going to be key for companies in the petrochemicals sector to take advantage of the very real opportunities that exist."

IF YOU WERE ENTERING THE INDUSTRY NOW, WOULD YOU PURSUE A CAREER IN YOUR SECTOR?



Summary Petrochemicals

In many ways, this year's survey highlights just how interconnected the different sectors are, and how the fortunes of one affect the others. This is particularly notable in the petrochemicals sector, which is dependent on the oil and gas sector for feedstock but serves a wide variety of markets, including renewables and power.

The big themes of the year – pandemic and energy transition – are writ large in this sector, as are ongoing concerns about talent. But this also suggests a leading role for the sector in building a resilient talent base and developing the complementary skills on which the entire value chain depends.

GETI
Global Energy Talent Index

airswift TRUSTED WORLDWIDE energyjobline

GETI
Global Energy Talent Index

airswift
energyjobline

Power

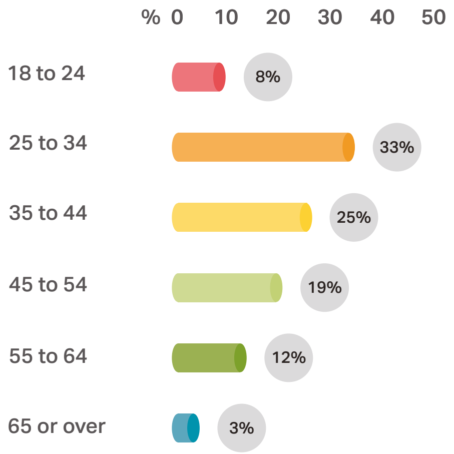
Contents: Power

Power

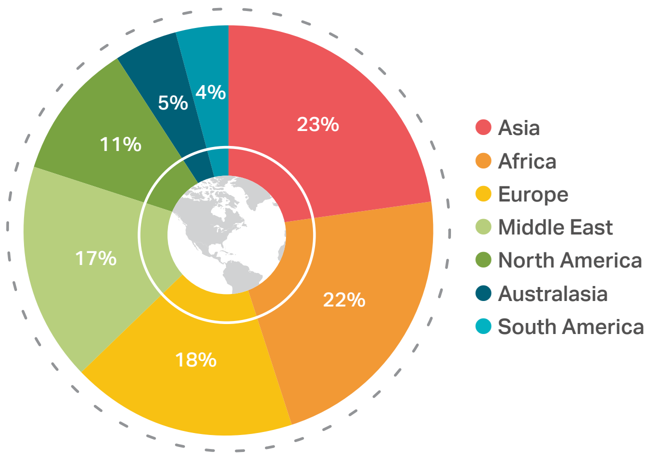
The line between power and renewables is increasingly blurred. Some see this as a threat, but for the ambitious power professional it unlocks a world of opportunities. With a sector-wide skills gap and COVID-19 leaving its mark, are power companies doing enough to retain skilled workers?

1. DEMOGRAPHICS

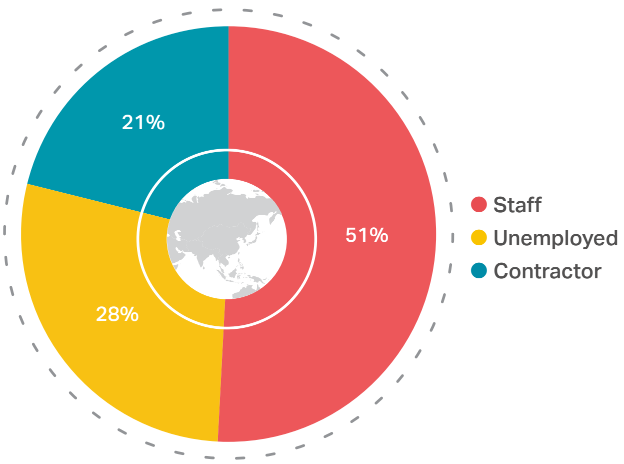
AGE



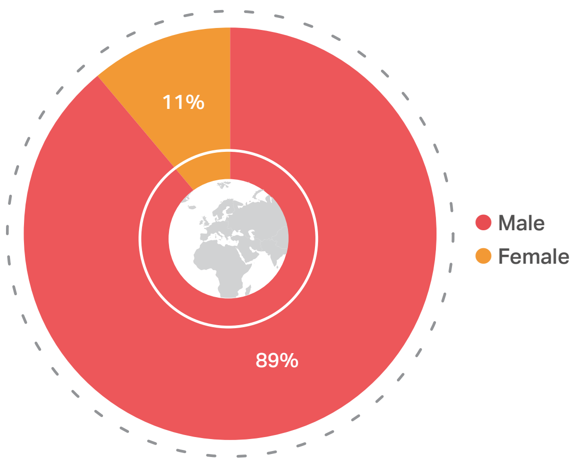
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

Despite a sector-wide skills gap, fewer power professionals report pay rises this year, down to 38 per cent from 48 per cent in 2020. While a considerable eight per cent report pay rises of more than five per cent, this is countered by 16 per cent reporting a decrease in pay – up eight per cent on 2020.

PERMANENT WORKER ANNUAL SALARY, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**55,740**	**49,407**	**68,867**	**44,397**	**56,615**	**42,360**	**47,318**	**76,016**
Business Development Manager	60,487	47,820	73,875	62,118	56,123	42,600	45,917	80,648
CAD Technician/ Operator	30,356	29,371	38,726	23,572	39,826	23,500	29,257	40,799
Chemical Engineer	59,261	49,278	69,507	41,713	57,748	38,500	45,474	80,963
Civil Engineer	49,241	40,343	58,675	32,033	51,678	31,000	41,851	60,973
Commercial Manager	54,564	61,857	89,954	48,000	76,382	78,500	63,097	98,729
Commissioning Engineer	57,751	56,164	65,355	50,057	59,489	33,400	48,860	70,749
Construction Manager	66,760	56,191	81,982	56,471	63,888	41,200	56,299	88,248
Control Room Operator	51,001	37,897	56,457	37,788	41,255	33,400	37,795	68,000
Design Engineer	51,679	39,305	62,352	39,014	51,342	53,700	41,966	69,677
Electrical Engineer	55,071	45,138	75,228	41,515	58,165	60,800	45,340	77,132
HSE Manager	57,968	47,844	79,985	53,648	67,163	37,800	47,115	80,598
Inspection Engineer	55,282	55,329	66,238	41,164	48,957	34,900	44,339	73,517
Instrumentation Engineer	64,890	65,200	75,119	50,588	64,446	38,900	49,723	88,433
Maintenance Engineer	57,914	44,427	70,367	42,728	51,822	43,700	47,771	75,387
Mechanical Engineer	52,933	41,589	66,351	39,515	57,299	40,100	49,256	74,040
Plant Manager	66,656	54,914	80,975	56,471	65,903	42,600	63,362	91,036
Project Engineer	63,492	53,853	72,838	47,415	64,418	38,900	53,677	86,047
Project Manager	63,459	74,300	79,350	56,471	66,157	44,900	57,218	84,702
QA/QC Inspector	54,193	46,510	65,835	37,072	44,915	59,900	38,788	76,011
Quantity Surveyor	41,846	40,818	48,179	30,584	45,325	28,900	39,249	54,622

CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**379**	**384**	**489**	**268**	**422**	**293**	**437**	**558**
Business Development Manager	390	370	523	259	434	305	384	576
CAD Technician/ Operator	190	249	284	190	302	168	251	327
Chemical Engineer	387	369	480	259	418	240	360	582
Civil Engineer	358	322	438	212	385	221	500	473
Commercial Manager	388	458	617	344	542	608	500	691
Commissioning Engineer	377	432	481	286	450	225	500	543
Construction Manager	444	414	576	260	486	285	575	656
Control Room Operator	307	284	405	234	319	230	287	499
Design Engineer	344	312	446	312	376	360	324	520
Electrical Engineer	392	348	526	271	436	420	500	570
HSE Manager	395	368	574	317	498	238	500	581
Inspection Engineer	396	412	472	301	382	258	350	526
Instrumentation Engineer	437	361	526	299	465	266	500	648
Maintenance Engineer	372	351	489	302	377	258	358	551
Mechanical Engineer	379	335	472	276	420	285	500	564
Plant Manager	447	408	550	259	464	290	600	639
Project Engineer	414	400	491	277	487	260	500	604
Project Manager	438	580	575	270	489	325	600	637
QA/QC Inspector	403	480	484	295	366	410	322	559
Quantity Surveyor	314	420	369	141	349	210	321	420

38%

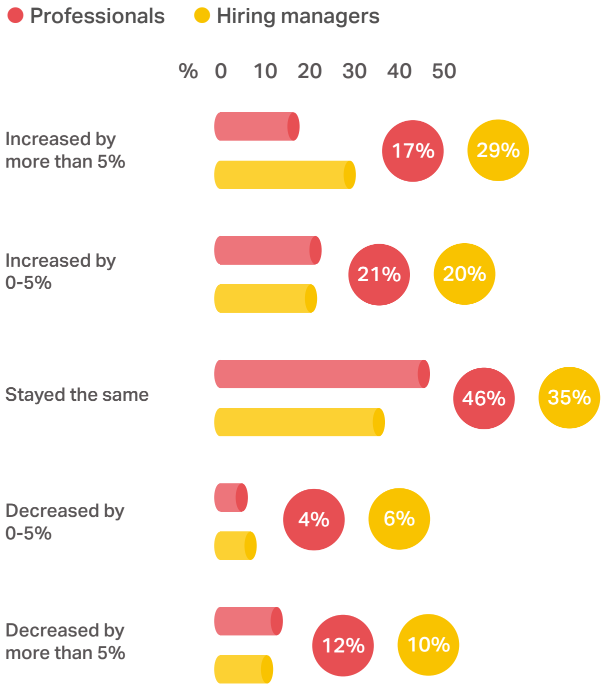
of professionals report an increase in pay over the past year.

63%

of professionals expect pay to rise in the coming year.

While hiring managers are attuned to these decreases, they are more positive about increases, with nearly half (49 per cent) reporting pay rises.

PAY CHANGES IN THE LAST 12 MONTHS



Janette Marx, CEO of Airswift, says: "Demand for skilled workers remains high and it continues to be difficult to find the right people. This may have contributed to power salaries being less affected by COVID-19 than elsewhere in the energy industry."

> *"Power companies are beginning to feel the pinch of the skills shortage which is driving up pay rates."*
>
> ***– Josh Young***

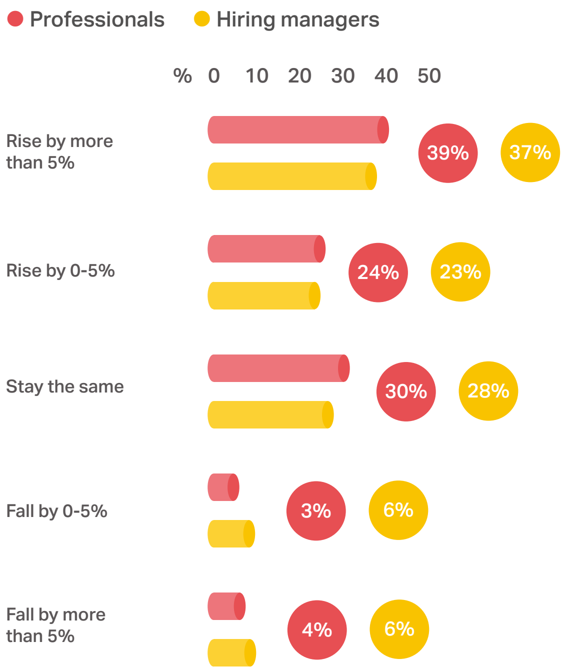
Reflecting this, professionals remain optimistic for the future. There was only a slight decrease in respondents expecting a pay rise in 2021, down to 63 per cent from 71 per cent last year. Four in ten expect to see a pay rise of more than five per cent while less than one in ten expect to see pay fall. Hiring managers share these expectations, although six per cent expect pay to drop by more than five per cent.

39%

of professionals expect to see pay increases of more than five per cent over the coming year.

"Power companies are beginning to feel the pinch of the skills shortage which is driving up pay rates. At the same time, employees – particularly those with 10-15 years' experience – understand their value in this context and feel empowered and optimistic because of it," Josh Young, Director of Energy Jobline, explains.

PAY EXPECTATIONS FOR THE NEXT 12 MONTHS



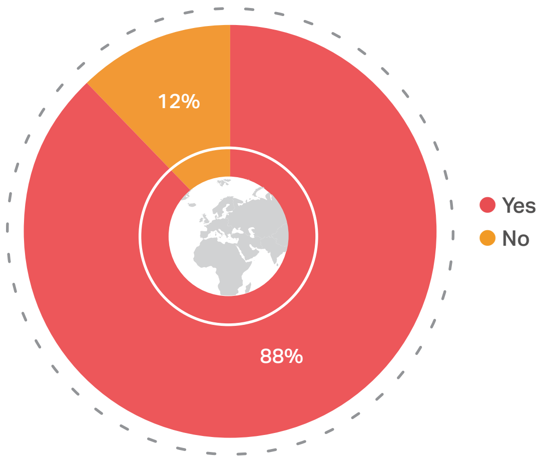
3. GLOBAL MOBILITY

Interest in relocating to another region for work is high and holding steady year on year with 88 per cent of professionals saying that they would consider a move. Only half say that their employers provide cross-regional job transfers. However, when asked where they'd like to relocate to, 33 per cent identify Europe as their top destination. North America trails in second with 16 per cent, closely followed by Australasia on 15 per cent and the Middle East on 14 per cent.

47%

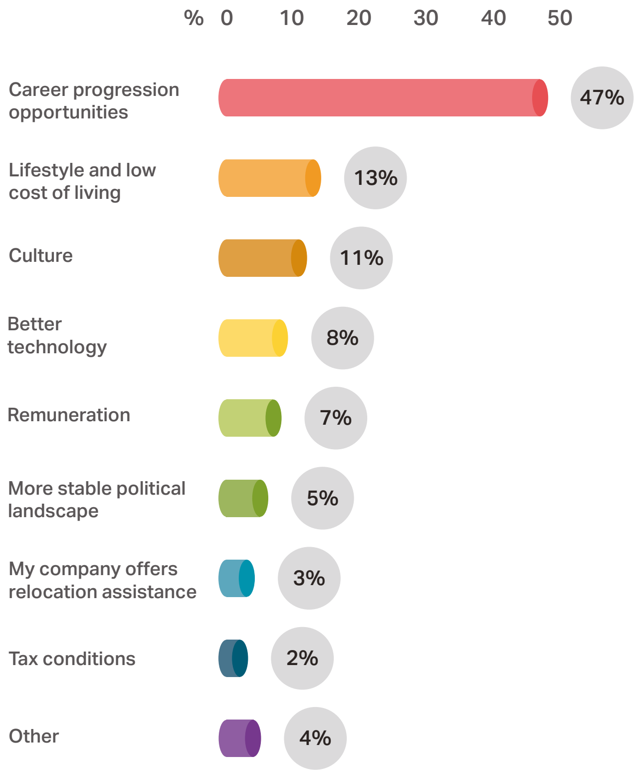
of those open to relocating cite career progression opportunities as a key motivator.

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



Marx notes: "Career progression really resonates with power professionals – in fact nearly half of those surveyed say they would relocate for that reason. Europe is seen as a progressive region for power by many, which positions it as an attractive place to work. The downturn in tax advantages in the Middle East and the difficulty of gaining entry to the US for work, leaves us with this big gap in appeal."

WHAT IS YOUR MAIN REASON FOR BEING ATTRACTED TO A NEW LOCATION?



After career progression (47 per cent), professionals identify lifestyle and low cost of living (13 per cent) and culture (11 per cent) as reasons they would relocate to a particular region. Of those not interested in moving, 47 per cent say proximity to family is a significant motivator.

"Many power plants are ageing and require extensive redesign and improvement to meet standards. Add in smart grid innovations and there's an ever-increasing pipeline of opportunities tempting power professionals to relocate whether for career progression or a change of lifestyle," Young says.

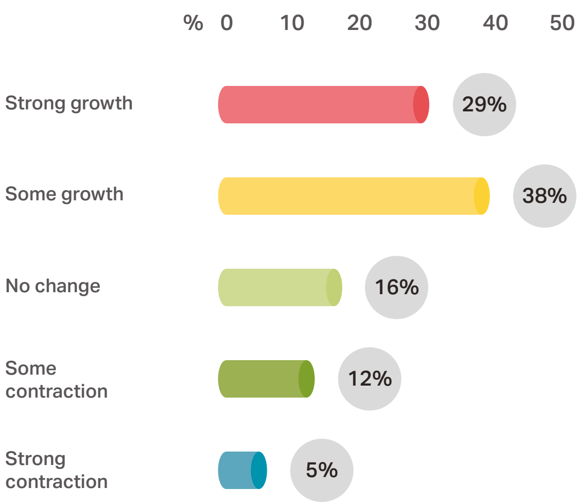
4. AN UNCERTAIN FUTURE?

That pipeline of opportunities also reflects positively on professionals' views of sector growth over the past year, although hiring managers are more positive than their employees (71 per cent and 64 per cent, respectively). This compares to 17 per cent of respondents overall who believe the sector has contracted.

67%

of respondents believe that the sector has grown over the past year. Seventeen per cent think it has contracted.

HOW STRONGLY HAS YOUR SECTOR GROWN OR CONTRACTED OVER THE PAST YEAR?

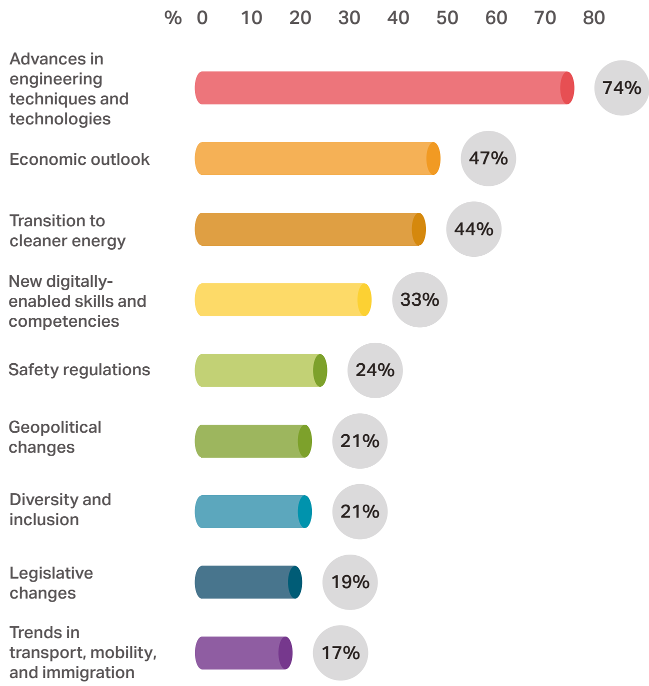


"There's an increasingly blurred line between power and renewables with innovations such as battery storage creating a positive impact on the sector. Professionals see investment coming in for all sorts of projects and it gives them reason to be positive now, and in the future," Marx says.

Indeed, 77 per cent of respondents think the sector will grow over the next three years, with 39 per cent expecting strong growth. Only 12 per cent think the sector will contract.

"While on the surface these figures look positive, power professionals are in fact less certain about growth than their renewables counterparts. This may come down to whether you think these innovations create progress for your sector or not," Young adds.

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT OPPORTUNITIES FACING YOUR SECTOR OVER THE NEXT THREE YEARS?



"Professionals see investment coming in for all sorts of projects and it gives them reason to be positive now, and in the future."

– Janette Marx

Opinions are mixed on whether the transition to cleaner energy represents a significant opportunity for power, with 44 per cent of respondents saying that it does. Instead, nearly three quarters say advances in engineering techniques and technologies are among the biggest opportunities facing the sector.

"Seeing this consensus on engineering is very encouraging," Young remarks. "And it brings with it a sense of optimism for the future too. You only have to look at how the world intends to end energy poverty to understand how different power could look only a few years from now."

42%

of respondents think the availability of capital is among the most important challenges facing the sector over the next three years.

In line with the energy industry more broadly, over half (56 per cent) think COVID-19 and public health is the biggest challenge and a further 42 per cent identify availability of capital. Respondents are evenly split on whether the current economic climate represents an opportunity or a challenge (47 per cent versus 44 per cent respectively).

"You only have to look at how the world intends to end energy poverty to understand how different power could look only a few years from now."

– Josh Young

"While on the surface these figures look positive, power professionals are in fact less certain about growth than their renewables counterparts. This may come down to whether you think these innovations create progress for your sector or not."

– Josh Young

"Concerns around COVID-19 and its impact on the ability for new projects to reach financial investment decision is wide-ranging and the power sector is no different in feeling this burden. However, power professionals also recognise the immense possibilities that come with innovative engineering and novel techniques, which gives them cause for hope," Young summarises.

44%

of respondents believe the transition to cleaner energy is one of the most important opportunities facing the sector over the next three years.

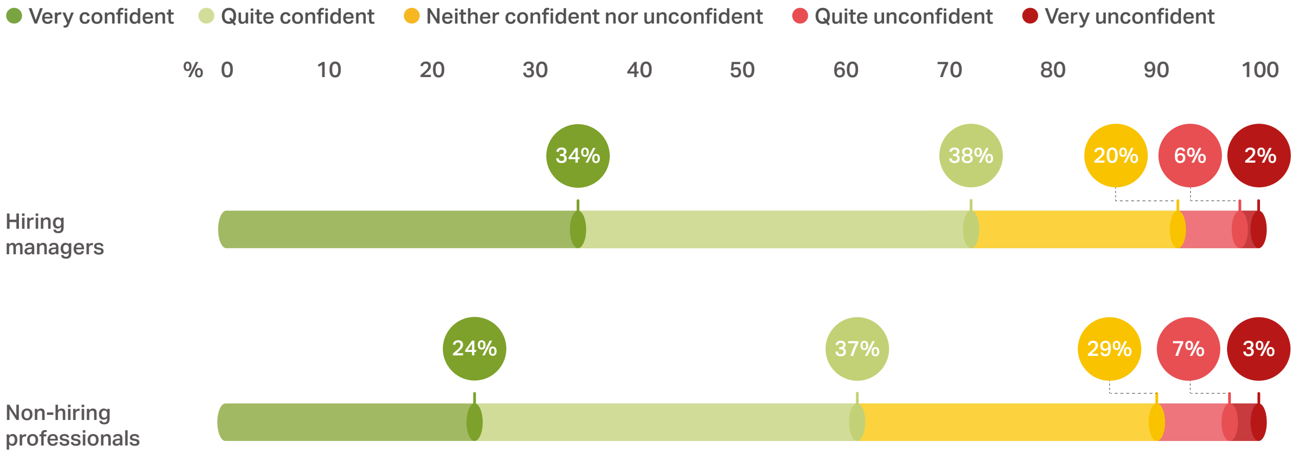
5. BUILDING RESILIENCE

Respondents are, on the whole, confident in their firm's ability to handle change. Sixty-five per cent say that their employer is resilient, with only 10 per cent unconfident. Hiring managers are even more positive than professionals, with 34 per cent saying they are "very confident" compared with 24 per cent of professionals.

65%

of respondents are confident that their firm is resilient to the challenges it faces.

HOW CONFIDENT ARE YOU THAT YOUR EMPLOYER IS RESILIENT TO THE CHANGES IT HAS FACED AND WILL FACE IN THE FUTURE?



When asked to consider what measures employers should take to build resilience into the business, nearly half of respondents identify increased training and mentorship. Reflecting the sector's interest in technology, the adoption of automation and digital technologies also scores highly, with 44 per cent identifying it as a resilience building measure.

"Hiring managers and professionals appear well aligned on the benefits of digitalisation – indeed 45 per cent of respondents report their employer adopting automation and digital technologies. This interest is also reflected in the types of training programmes we see on offer, which increasingly have a technology angle. However, it is a case of being careful of what you wish for as it's possible automation will affect headcount," Marx warns.

Whether automation will hit jobs is yet to be seen. For now, 17 per cent of employers are implementing retention programmes for quite the opposite reason; to ensure staff stay put. Around a third of respondents say their employers are offering training and mentorship to build resilience with almost the same number again offering workspace flexibility.

Marx explains: "Power, and its distribution, is such an essential part of our everyday lives. It's a commodity that most of us simply cannot live or do business without. Regardless of the economic climate, few have cut back on their consumption, which underpins the sector's resilience."

"Hiring managers and professionals appear aligned on the benefits of digitalisation. However, it's possible automation will impact headcount."

– Janette Marx

MEASURES RESPONDENTS WANT VS MEASURES COMPANIES ARE TAKING

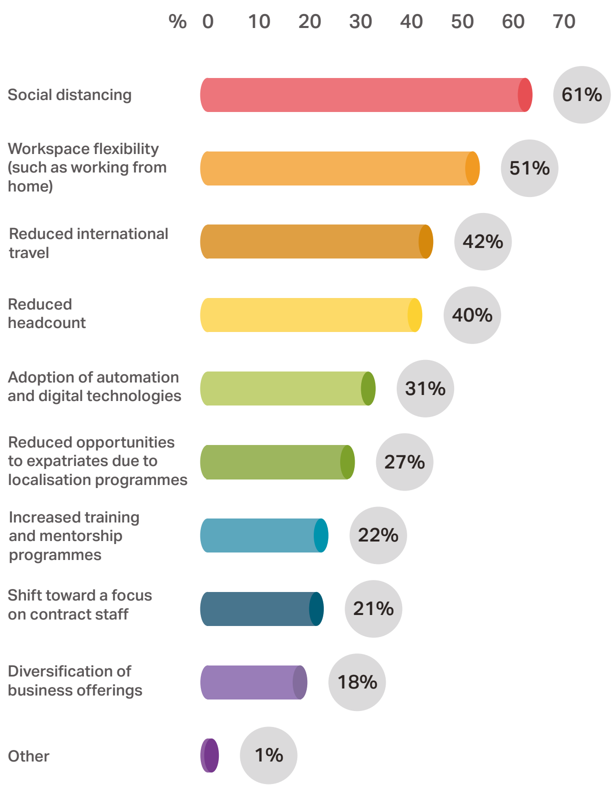
6. A NEW NORMAL?

An overwhelming majority (86 per cent) of respondents feel that a new normal is on the horizon, with 44 per cent suggesting that COVID-19 has already instigated a new way of working. Social distancing (61 per cent), workspace flexibility (51 per cent) and reduced international travel (42 per cent) are identified as key markers of this change. Less encouragingly, two in five also expect a reduced headcount.

80%

say the transition to cleaner energy has accelerated over the past 12 months.

WHAT IS THE NEW NORMAL FOR YOUR SECTOR?



"What stands out, alongside other sectors, is the high percentage of power professionals that say the energy transition has accelerated over the past year."

– Janette Marx

"The changes in the way power professionals are working is broadly in line with what we are witnessing in other sectors. What stands out, however, is the high percentage of professionals that say the energy transition has accelerated over the past year," Marx notes.

Sixty per cent of respondents believe that the transition to cleaner energy has quickened, second only to those working in renewables. Further, only ten per cent say that it has decelerated or regressed.

"It's great to see that respondents are feeling the momentum behind the transition too. It is absolutely the biggest issue of our time and power professionals have a critical role to play."

– Josh Young

"It's great to see that respondents are feeling the momentum behind the transition too. It is absolutely the biggest issue of our time and power professionals have a critical role to play," says Young.

7. ATTRACTING AND RETAINING TALENT

Concerns about an impending talent crisis in power is picking up. Fifty-nine per cent of power professionals are worried that companies will not be able to fill essential roles – an 11 per cent increase from just two years ago. Indeed, only 16 per cent say they are worry-free.

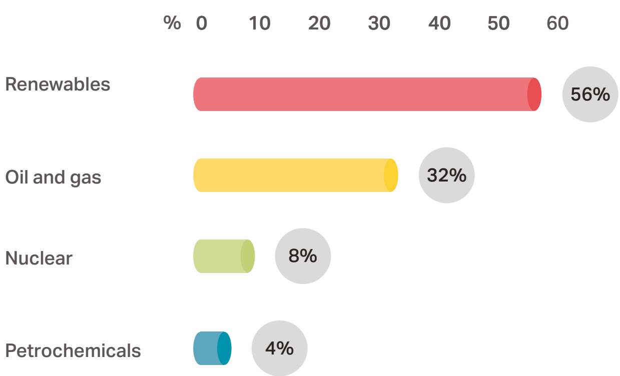
Young comments, "Last time we felt that respondents had underestimated the urgency of the talent crisis but it's safe to say we're now on the same page. With COVID-19, the situation has become even more tricky. When you add together the pandemic, a retiring workforce and the sector's somewhat staid image, it's getting harder and harder to find the talent that the sector so desperately needs."

59%

of power professionals are worried about an impending talent crisis.

Eighty-four per cent of respondents would consider switching to another sector in the next three years, however, the destination is changing year on year. While renewable energy remains the firm favourite at 56 per cent, those interested in oil and gas has dropped sharply from 41 per cent last year, to 32 per cent this year.

IF YOU WOULD CONSIDER SWITCHING SECTORS, WHICH SECTOR WOULD YOU BE MOST INTERESTED IN SWITCHING TO?

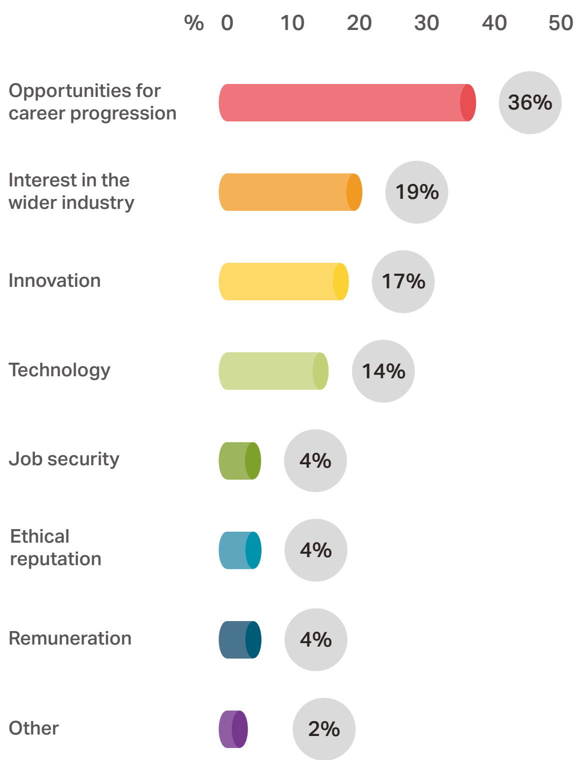


"The gap between the 'old' and the 'new' ways of energy production has widened dramatically," notes Marx. "Oil and gas was a top destination for would-be sector hoppers because of the reputation for high pay, but that is fading. At the same time, for those looking for security and career progression, renewables is a solid choice. After all, renewables is touted as the future of energy, and who doesn't want to work in the future?"

Underlining this, opportunities for progression remain the primary motivator for those considering a switch, with 36 per cent of respondents identifying as such. Interestingly however, men are much more likely to switch sectors for career progression than women – 37 per cent versus 24 per cent.

A wider interest in the energy industry is second most popular at 19 per cent, followed by innovation (17 per cent) and technology (14 per cent).

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



Sixty-eight per cent of power professionals feel less secure in their jobs than a year ago despite a shortage of skilled workers, with 71 per cent of those identifying COVID-19 as the primary cause of their insecurity. Only 13 per cent feel more secure.

"When you add together the pandemic, a retiring workforce and the sector's somewhat staid image, it's getting harder and harder to find the talent that the sector so desperately needs."

– Josh Young

Unfortunately, this worry is shared by 67 per cent of hiring managers who think their employees' jobs are less secure, and a similar percentage agree that COVID-19 is a key factor. That said, nearly a fifth say they feel their employees' job security has improved.

84%

of respondents would consider switching to another sector in the next three years.

"This year has shaken everyone's security, and many power professionals say that they are expecting reduced headcounts, so their worry is understandable. In the long term however, COVID-19 may not be the biggest threat – automation is the one to watch," notes Marx.

Despite these concerns, 72 per cent of respondents say if they were entering the industry now, they would still pursue a career in the sector – a figure that holds steady from a couple of years ago. Notably, those in the prime of their career are much more likely to respond positively than their older and younger counterparts (74 per cent versus 68 per cent and 67 per cent, respectively).

68%

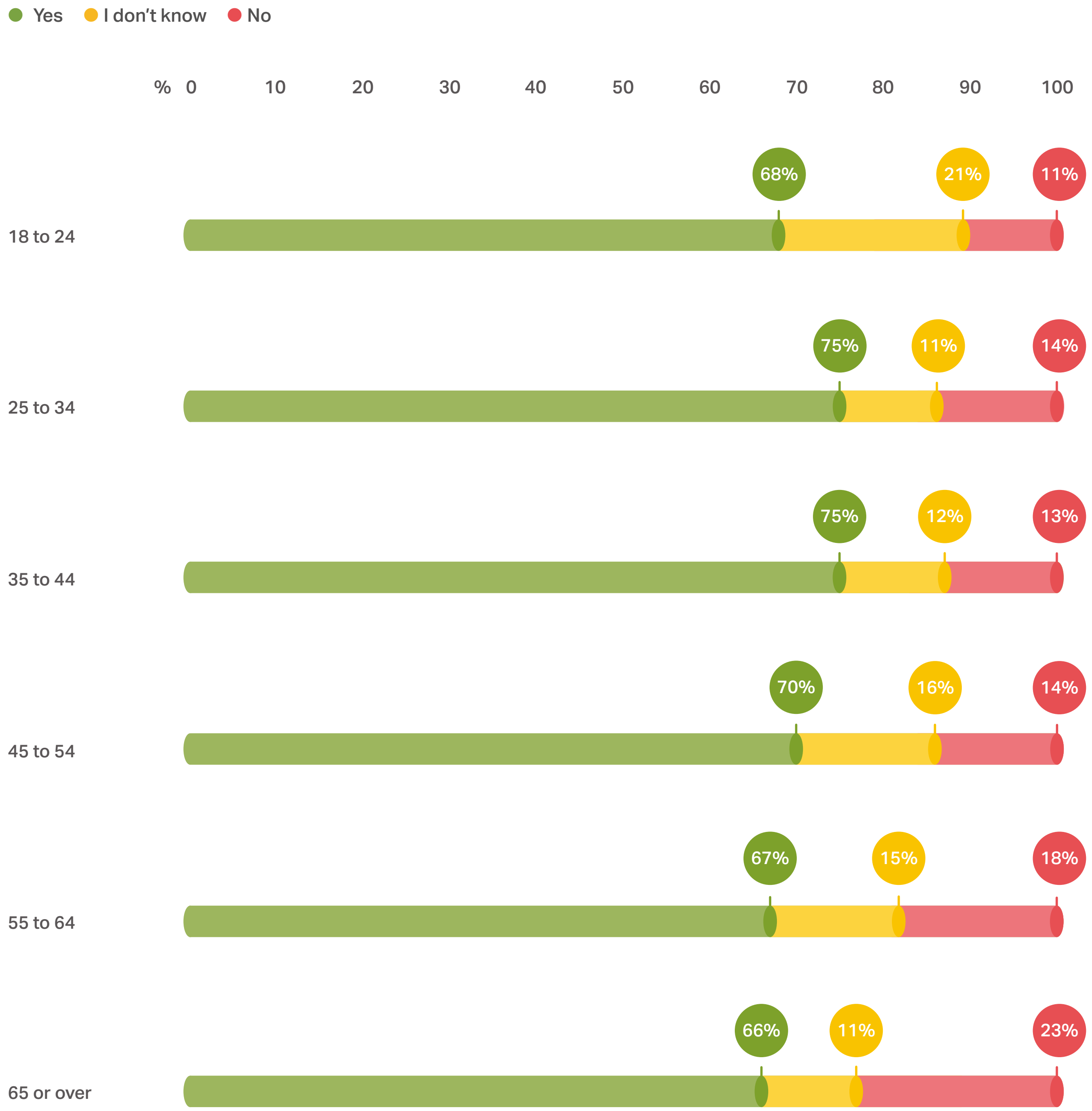
of respondents feel less secure in their jobs than they did a year ago.

"This is yet another reflection of the skills shortage," Young explains. "Those in the prime of their careers know that they are needed, feel valued and can map out their careers in the sector. For those just starting out, it is not as clear cut, and the sector doesn't have the same allure or culture as renewables – they need to give it time."

"This year has shaken everyone's security, and many power professionals say that they are expecting reduced headcounts, so their worry is understandable. In the long term however, COVID-19 may not be the biggest threat – automation is the one to watch."

– Janette Marx

IF YOU WERE ENTERING THE INDUSTRY NOW, WOULD YOU PURSUE A CAREER IN YOUR SECTOR?



Summary
Power

This year's results point to an increasing interest in the renewables sector and while many power professionals seem happy where they are, even more would consider moving sectors. With ambitious employees, power employers need to work harder to keep them engaged.

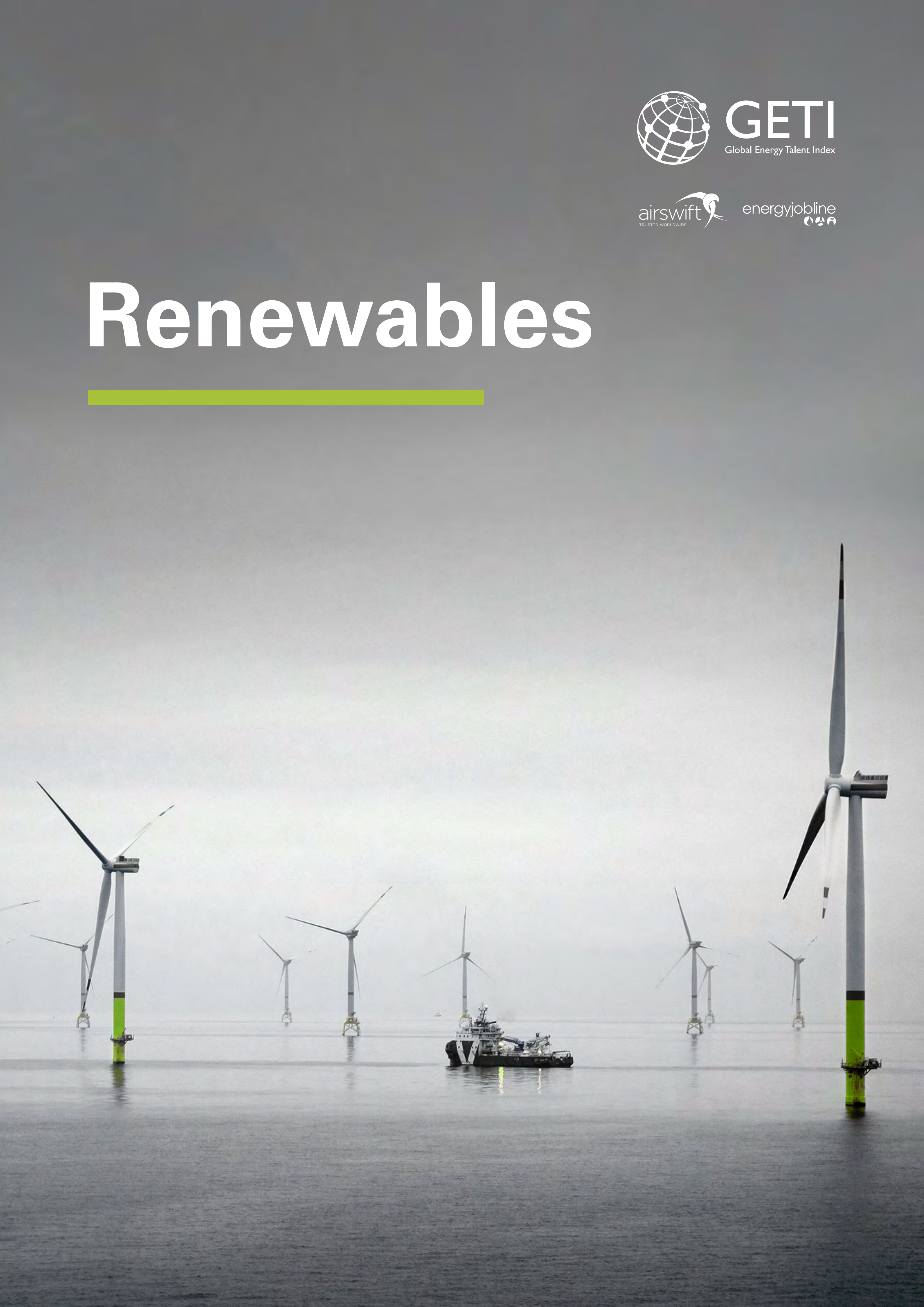
Thankfully, the clean energy transition is opening up new technologies and hybrid projects every day, helping to make new roles as old ones are lost to automation. Now is the time for the power sector to lean in because, as Marx puts it, "who doesn't want to work in the future?"

GETI
Global Energy Talent Index

airswift
TRUSTED WORLDWIDE

energyjobline

Renewables



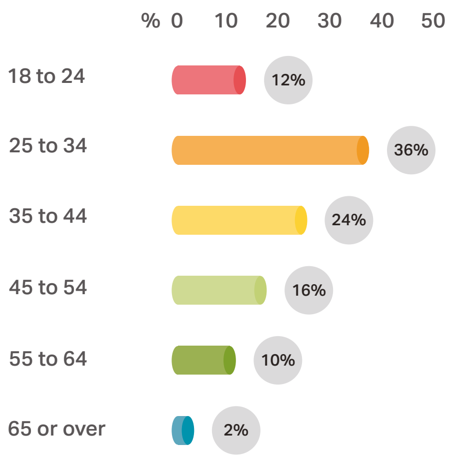
Contents: Renewables

Renewables

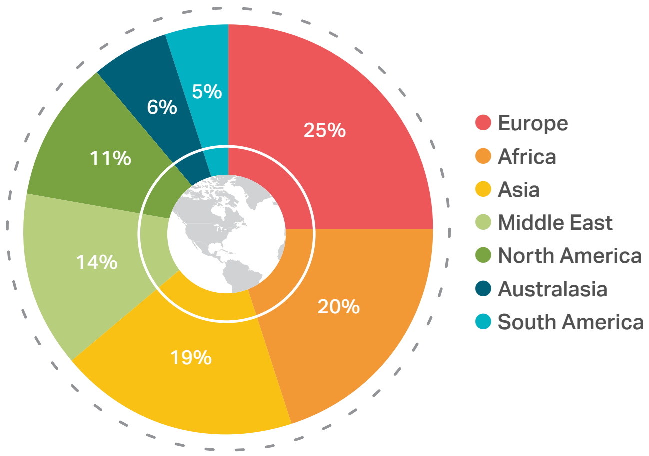
The renewables sector continues to enjoy reliable growth, broadly positive salaries, and optimistic expectations for the future. COVID-19 has constrained the sector to an extent, but environmental concerns and societal demands for energy transition continue to drive it forward. However, the sector cannot rely on these external forces alone. There is an opportunity to do more to secure the talent needed to meet demand.

1. DEMOGRAPHICS

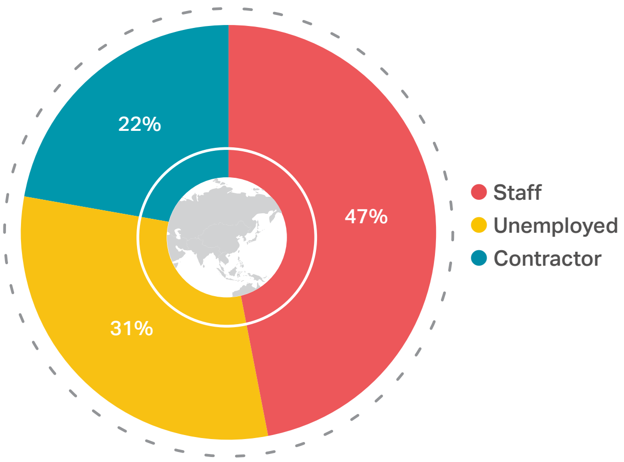
AGE



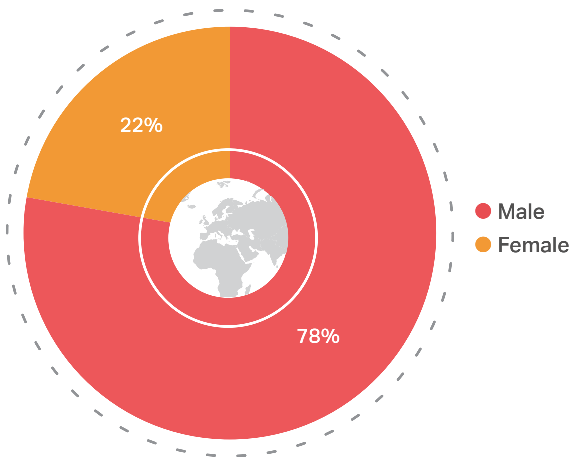
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

On salaries, it is broadly good news in the renewables sector. Thirty-five per cent of respondents report a pay increase while 17 per cent report a decrease. However, this is still down from last year when 48 per cent reported a pay rise and eight per cent a salary drop.

PERMANENT WORKER ANNUAL SALARY, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**55,021**	**47,694**	**73,493**	**45,237**	**59,607**	**40,601**	**48,255**	**74,708**
Biomass Engineer	46,947	46,842	63,411	35,049	61,386	32,100	43,625	67,895
Business Development Manager	62,186	49,639	76,408	62,118	56,516	42,220	47,602	83,715
Civil/Structural Engineer	61,328	41,485	79,528	42,298	74,624	57,600	46,445	82,529
Commercial Manager	46,350	53,285	108,784	45,177	66,428	61,000	46,752	62,385
Construction Manager	68,256	58,359	83,958	56,471	65,820	46,800	58,427	90,918
Design Engineer	52,136	40,295	62,903	39,730	52,788	55,600	43,204	70,712
Electrical Engineer	60,207	47,454	80,082	47,989	64,224	41,300	51,434	87,901
Energy Engineer	46,494	48,978	65,023	31,318	53,070	30,900	43,149	61,992
HSE Manager	60,370	49,664	80,553	56,471	68,456	39,900	48,086	83,664
Maintenance Engineer	60,156	46,370	71,300	43,530	52,711	38,700	48,971	77,231
Marine Engineer	51,750	42,694	76,490	38,635	59,177	33,400	54,393	67,585
Mechanical Engineer	55,531	43,258	70,653	41,457	59,703	39,900	52,726	77,346
Operations Manager	67,690	52,460	81,243	44,749	68,420	46,700	50,000	83,084
Project Engineer	65,907	54,183	76,105	49,218	64,681	38,900	55,881	87,901
Project Manager	64,919	55,922	82,635	56,471	68,524	44,700	58,378	88,031
QA/QC Manager	62,290	54,558	75,047	53,648	62,551	41,200	52,125	85,477
Renewable Energy Consultant	43,201	49,376	64,300	40,942	60,752	34,500	43,350	66,762
Solar Engineer	38,634	37,511	47,386	28,236	43,076	31,200	35,026	50,653
Wind Farm Project Manager	47,712	45,757	76,674	62,118	47,913	26,800	52,563	66,375
Wind Turbine Technician	38,360	35,792	47,378	29,116	41,328	28,600	32,971	52,000

CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**374**	**414**	**520**	**260**	**526**	**275**	**435**	**546**
Biomass Engineer	294	333	442	224	435	228	313	478
Business Development Manager	435	399	555	259	599	301	369	596
Civil/Structural Engineer	395	331	549	297	500	390	500	581
Commercial Manager	344	615	751	301	471	460	500	470
Construction Manager	455	443	596	264	628	330	575	670
Design Engineer	342	333	448	314	368	390	340	518
Electrical Engineer	379	365	553	297	554	270	500	626
Energy Engineer	298	371	456	220	448	218	312	433
HSE Manager	419	560	567	236	541	213	500	610
Maintenance Engineer	393	371	507	301	536	210	365	569
Marine Engineer	339	465	539	246	603	230	400	492
Mechanical Engineer	382	480	496	278	626	270	500	580
Operations Manager	456	399	567	212	518	330	429	591
Project Engineer	444	423	545	274	451	240	500	624
Project Manager	427	444	589	349	685	312	600	646
QA/QC Manager	424	422	524	224	617	250	500	640
Renewable Energy Consultant	303	520	456	191	401	245	327	486
Solar Engineer	289	325	350	199	479	228	294	407
Wind Farm Project Manager	371	374	551	292	604	185	600	494
Wind Turbine Technician	290	310	353	226	455	203	269	402

35%

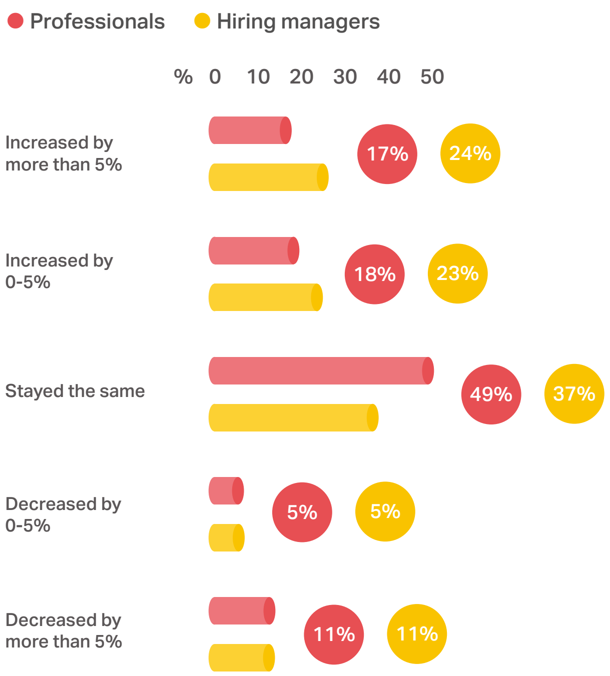
of professionals report a rise in income over the past year.

67%

of professionals expect an increase in pay in 2021.

Reports from hiring managers are in line with these changes, although they generally see more positive movement than individuals reporting on their own salaries. For example, 47 per cent say pay has increased, and 24 per cent say it has risen by more than five per cent.

PAY CHANGES IN THE LAST 12 MONTHS



Janette Marx, CEO of Airswift says: "This is a growth industry, and one that has been getting more investment, more projects, more attention, and more government assistance. There is a realistic expectation that the industry will grow – and that individual incomes will grow with it."

60%

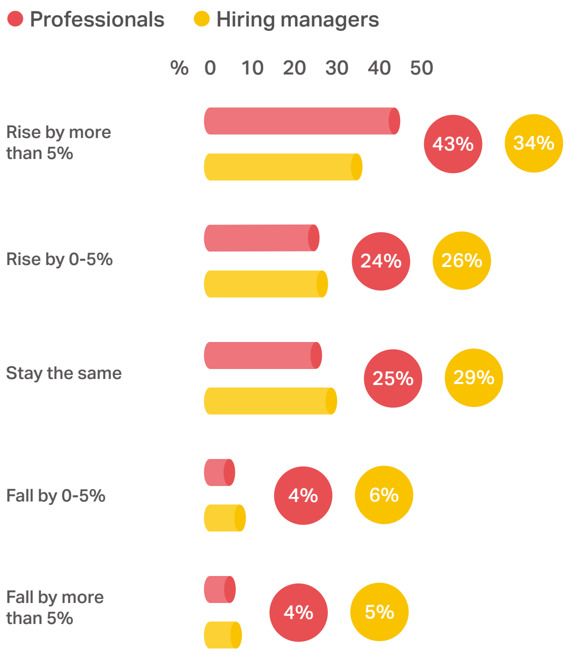
of hiring managers expect pay to rise over 2021. Only 11 per cent expect it to fall.

Looking to the future, levels of optimism remain relatively high among professionals. Sixty-seven per cent expect a raise next year (down from 72 per cent in 2019); 43 per cent expect to see pay rise by more than five per cent, just as they did last year. Only eight per cent expect salaries to fall in the next 12 months.

"This is a growth industry, and one that has been getting more projects, more attention, and more government assistance."

– Janette Marx

PAY EXPECTATIONS FOR THE NEXT 12 MONTHS



Josh Young, Director of Energy Jobline says: "In the context of the pandemic, the fall in optimism is really quite small. The bigger issue for the future is the balance between continuing subsidies and the fundamentals of turning a profit. Over-dependence on government assistance going forward may be the more significant pay constraint."

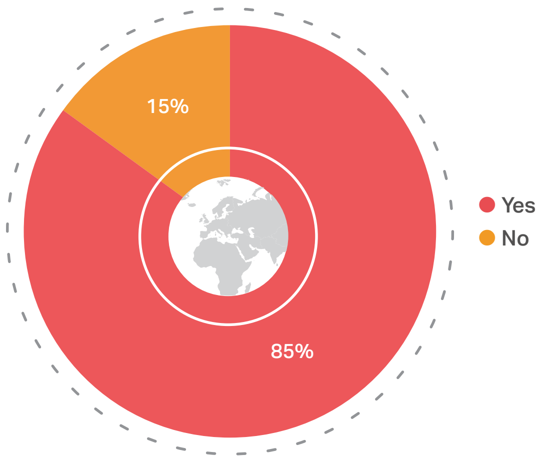
3. GLOBAL MOBILITY

The number of professionals who would consider relocating to another region for work is high – and holding steady year-on-year. Eighty-five per cent of professionals would consider such a move, with 46 per cent saying their employers provide cross-regional job transfers.

"People want to go where the jobs are. Europe has the projects. It has the work."

– Josh Young

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



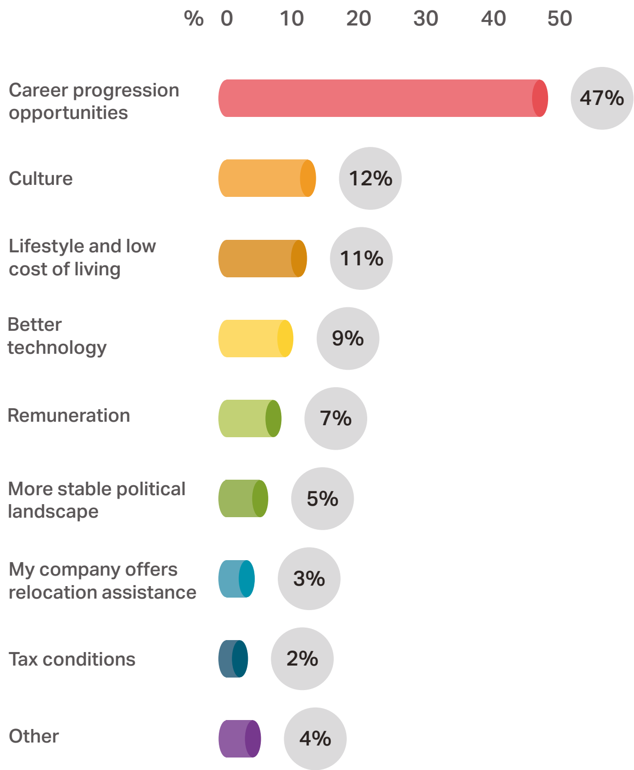
However, when it comes to mobility there are important differences between renewables and other sectors.

Marx says that mobility within the renewables sector tends to be more regional than global, and with more short-term assignments. "The typical project lifecycle makes a difference," she says. "In the oil and gas sector, it can take years. In renewables the time from commissioning to operation is much shorter. It's not such a major commitment for professionals or their families."

As for preferred destinations, Europe leads the way – and by some margin. It is the choice of 28 per cent of respondents, with North America following as the preference of 16 per cent of respondents. Asia is the choice of 14 per cent, putting it in third place. Only nine per cent say they would consider the Middle East compared to 19 per cent two years ago.

Career progression is the main reason for considering an international transfer – as cited by 47 per cent of respondents. And since only 10 per cent say there aren't enough opportunities for long-term career advancement, it seems employers are largely meeting this demand.

WHAT IS YOUR MAIN REASON FOR BEING ATTRACTED TO A NEW LOCATION?

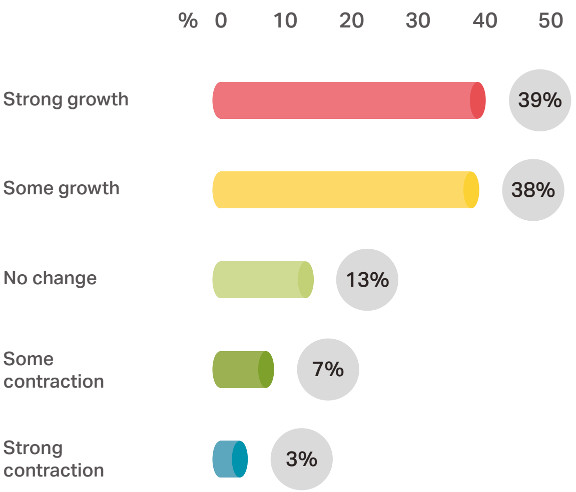


Young says, "People want to go where the jobs are. Europe has the projects. It has the work. America is up and coming, as is Asia. We've seen the Middle East fall as a preferred destination for energy workers across the board – and renewed tensions at the beginning of this year are a contributing factor."

4. AN UNCERTAIN FUTURE?

The renewables sector has come through the past year in pretty good shape, according to respondents. Seventy-nine per cent of hiring managers and 76 per cent of professionals believe the sector has grown in that time.

HOW STRONGLY HAS YOUR SECTOR GROWN OR CONTRACTED OVER THE PAST YEAR?



Respondents are even more optimistic for the medium-term future: 85 per cent expect the sector to grow in the next three years, with 52 per cent expecting that to be strong growth.

As Marx says: "In the past year, we have seen oil majors and Fortune 500 companies pivoting towards renewables. It adds to the excitement about the future of the sector. It's got momentum, and that is reflected in the survey's positive growth outlook."

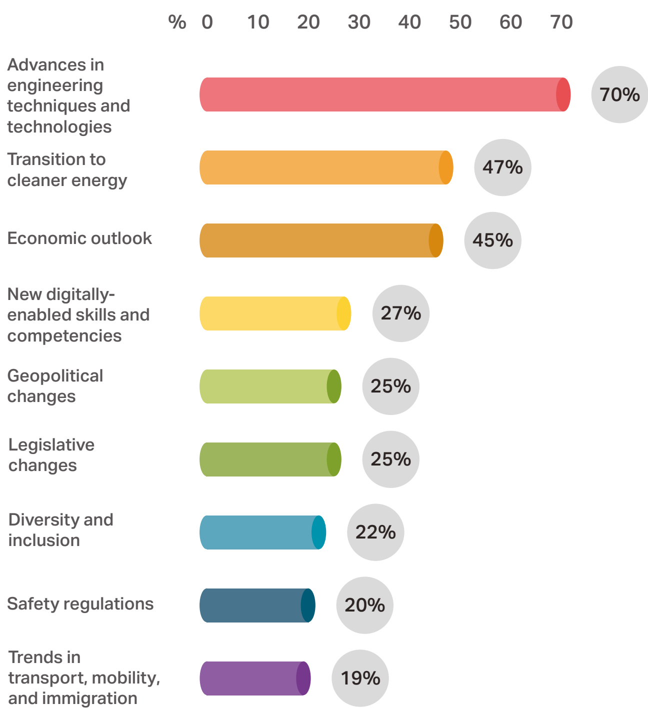
85%

of respondents expect the sector to grow over the next three years.

Naturally, challenges remain. COVID-19 and public health is seen as the biggest problem for the next three years by 56 per cent of respondents (who were surveyed before news of a credible vaccine). Financial issues are also a concern: 43 per cent say that the economic outlook is a challenge, with the same number citing capital availability.

At the other end of the scale, 70 per cent say advances in engineering techniques and technologies are the biggest source of opportunities. Forty-five per cent say that the economic outlook is an opportunity. Interestingly, just under half (47 per cent) suggest the transition to cleaner energy is a crucial opportunity for the renewables sector.

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT OPPORTUNITIES FACING YOUR SECTOR OVER THE NEXT THREE YEARS?



Young says: "It's going to take a lot longer than three years to transition to cleaner energy – something this sector knows better than any other. Respondents recognise the opportunity, but they also know there is some way to go. That is why the biggest opportunities lie in advances to engineering techniques and technologies. These innovations are essential for getting to the point where renewables can effectively displace other energy sources."

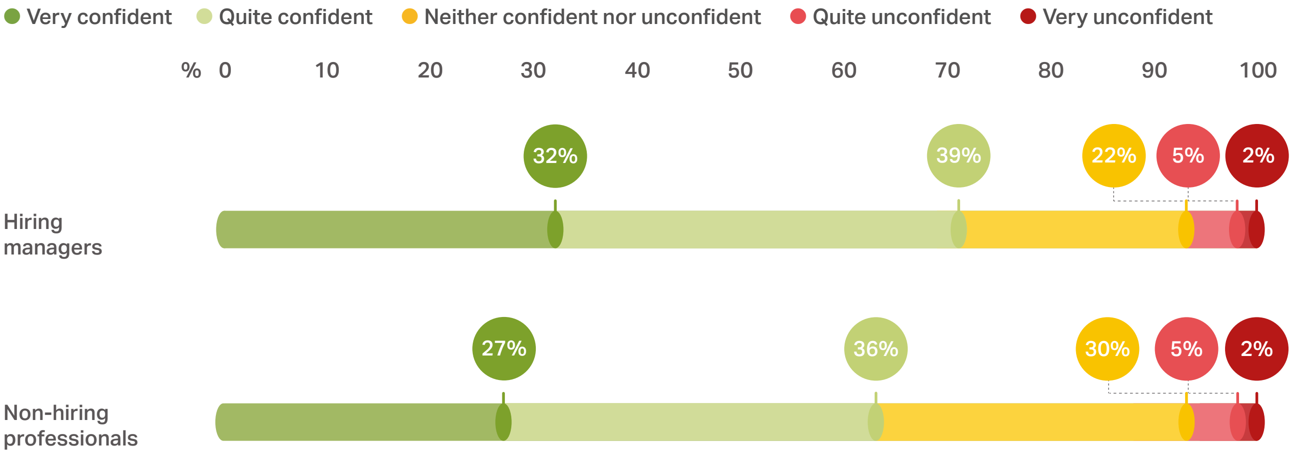
5. BUILDING RESILIENCE

When it comes to building resilient businesses, respondents are generally confident about their employer's efforts. Two-thirds say their business is resilient to current and future changes: indeed, 29 per cent are very confident.

66%

of respondents are confident that their firm is resilient to the challenges it faces.

HOW CONFIDENT ARE YOU THAT YOUR EMPLOYER IS RESILIENT TO THE CHANGES IT HAS FACED AND WILL FACE IN THE FUTURE?



When asked what measures employers should take to increase that resilience further, 44 per cent say increased training and mentorship. They are followed by 42 per cent who say greater adoption of automation and digital technologies, and a third saying workspace flexibility (which includes working from home).

This is broadly in line with the actions companies have taken to date. For example, 43 per cent report that their employer is adopting automation and digital technologies. Thirty-five per cent say there has been an increase in training and mentorship programmes, and a third say they are already seeing increased workplace flexibility.

Young says: "The renewables sector is already seen as very innovative, with comparatively high levels of automation and digital technologies in place. It is one of the ways in which companies have created strong employment brands. These kinds of technologies are not just a key element in operational resilience, they also contribute towards a robust skills pipeline."

There is a note of caution here, however. Thirty per cent would like to see retention programmes for key people and teams, but only 18 per cent say their employers are putting any in place.

Marx says: "This is not unusual. Employers put in place what they call retention programmes, but that doesn't necessarily mean much to an employee. The more meaningful approach is to work from the employee perspective and connect retention schemes to the individual and their career needs – not just the needs of the employer."

MEASURES RESPONDENTS WANT VS MEASURES COMPANIES ARE TAKING

6. A NEW NORMAL?

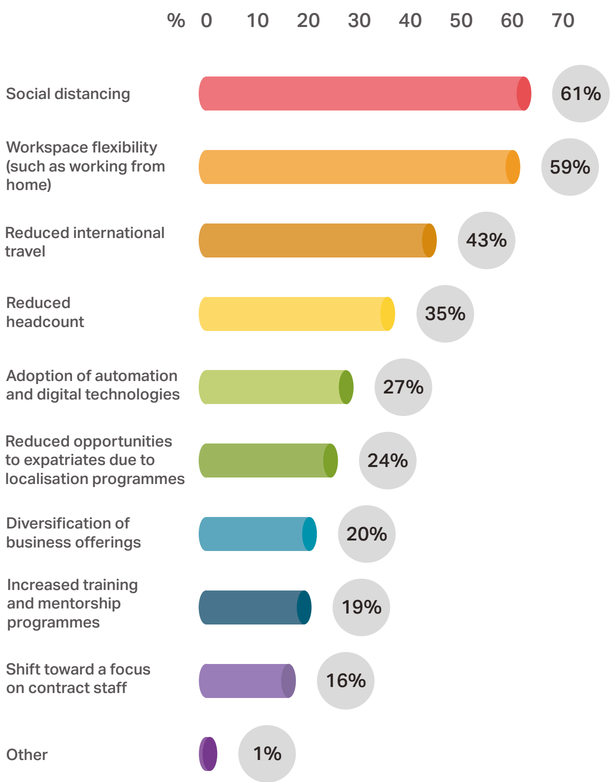
A new normal is on the way. After the events of 2020, that is the view of 88 per cent of respondents in the renewables sector, with 46 per cent saying that a new normal has already arrived.

For 61 per cent the new normal means social distancing; for 59 per cent, it's workspace flexibility; and for 43 per cent it is a reduction in international travel. In contrast, only 19 per cent feel it will mean more training and mentorship programmes.

59%

of respondents expect workspace flexibility to form part of a new normal for the sector.

WHAT IS THE NEW NORMAL FOR YOUR SECTOR?



"As it becomes more integrated, the shape of the renewables sector will continue to change. In an innovative sector like this, even the old normal is hard to define."

– Josh Young

This sector was also clear that the transition to cleaner energy is continuing, with 64 per cent saying that it has accelerated over the past year and 27 per cent saying that it has progressed at the same pace.

Whether continuing transition constitutes a 'new' normal for renewables workers, or rather a continuation of current experience is an interesting question, says Young. "There's already areas of cross-over between the renewables and power sectors, for example. As it becomes more integrated, the shape of the renewables sector will continue to change. In an innovative sector like this, even the old normal is hard to define."

A new normal is on the way. After the events of 2020, that is the view of 88 per cent of respondents in the renewables sector, with 46 per cent saying that a new normal has already arrived.

7. ATTRACTING AND RETAINING TALENT

The renewables sector is not immune to fears about an impending talent crisis. Fifty-seven per cent are worried about a potential skills gap – a clear increase from the 46 per cent who expressed similar fears two years ago.

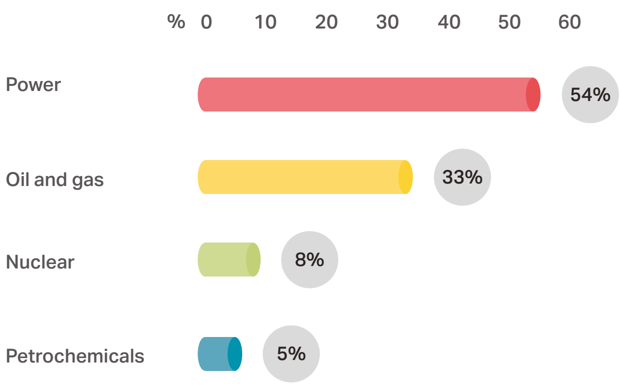
In addition, the renewables sector cannot rely on being the destination of choice for workers switching from other sectors. Renewables is certainly increasing in popularity among potential sector-switchers, but 78 per cent of respondents already working in renewables would consider switching in the next three years.

66%

of respondents feel less secure in their jobs than they did a year ago.

The power sector is the most popular alternative: 54 per cent of renewables workers would consider it, up from 46 per cent last year. Oil and gas remains the second most popular destination, chosen by a third. However, that is some way down from last year's 40 per cent.

IF YOU WOULD CONSIDER SWITCHING SECTORS, WHICH SECTOR WOULD YOU BE MOST INTERESTED IN SWITCHING TO?

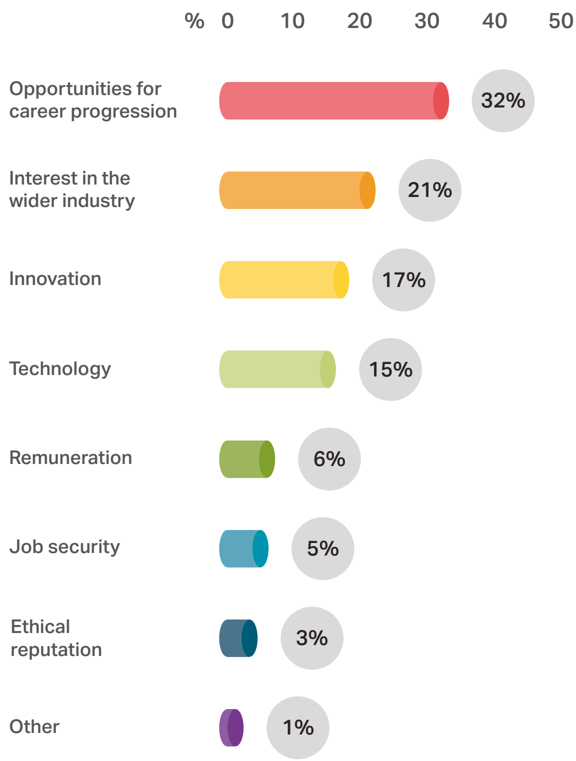


Perhaps relatedly, two-thirds of professionals feel less secure in their jobs than a year ago. This worry is shared by hiring managers, 68 per cent of whom think that jobs are less secure. Three quarters (76 per cent) of both professionals and hiring managers put this down to the disruptive impact of COVID-19.

As Young points out: "The renewables sector is quite optimistic about pay prospects and growth outlook. But the past year has been unnerving for the entire industry – and it seems that individuals within renewables have picked up on that instability and will consider alternative sectors to boost their own prospects."

Once again, opportunity for progression is the primary motivator. Thirty-two per cent of those open to a move say this is a determining factor in where they would end up, followed by 21 per cent who say interest in the wider industry, 17 per cent who say innovation and 15 per cent who say technology.

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



Marx says: "Now that other sectors are pivoting towards cleaner energy, innovation is increasing elsewhere. Advances in electric vehicles or energy storage, for example, bring renewables and the power sector closer together. Energy professionals who look for innovation and embrace change could find a home outside the renewables sector, and we could well see some talent swapping as traditional barriers between these sectors get fuzzier."

"Employers should consider how best to create and communicate opportunities for graduates and apprentices as part of their talent programmes. It is a great sector to work in – but not enough people know that."

– Josh Young

The big question is whether respondents would pursue a career in the renewables sector if they were entering the energy industry today? Seventy-seven per cent agree that they would – just as they did two years ago. However, among younger respondents there has been a notable change. Although 72 per cent say they would still pursue a career on the renewables sector, that is down from 81 per cent two years ago.

57%

of respondents are worried about a potential future talent crisis.

Marx admits to some concern. "Energy gets a tough time from popular media outlets, and society. But it is essential. Yes, it's changing, it's evolving, it's moving forward, but it's not going away. A pandemic doesn't change that. So, if professionals and hiring managers are feeling less secure and younger people are losing enthusiasm, that is a warning sign."

32%

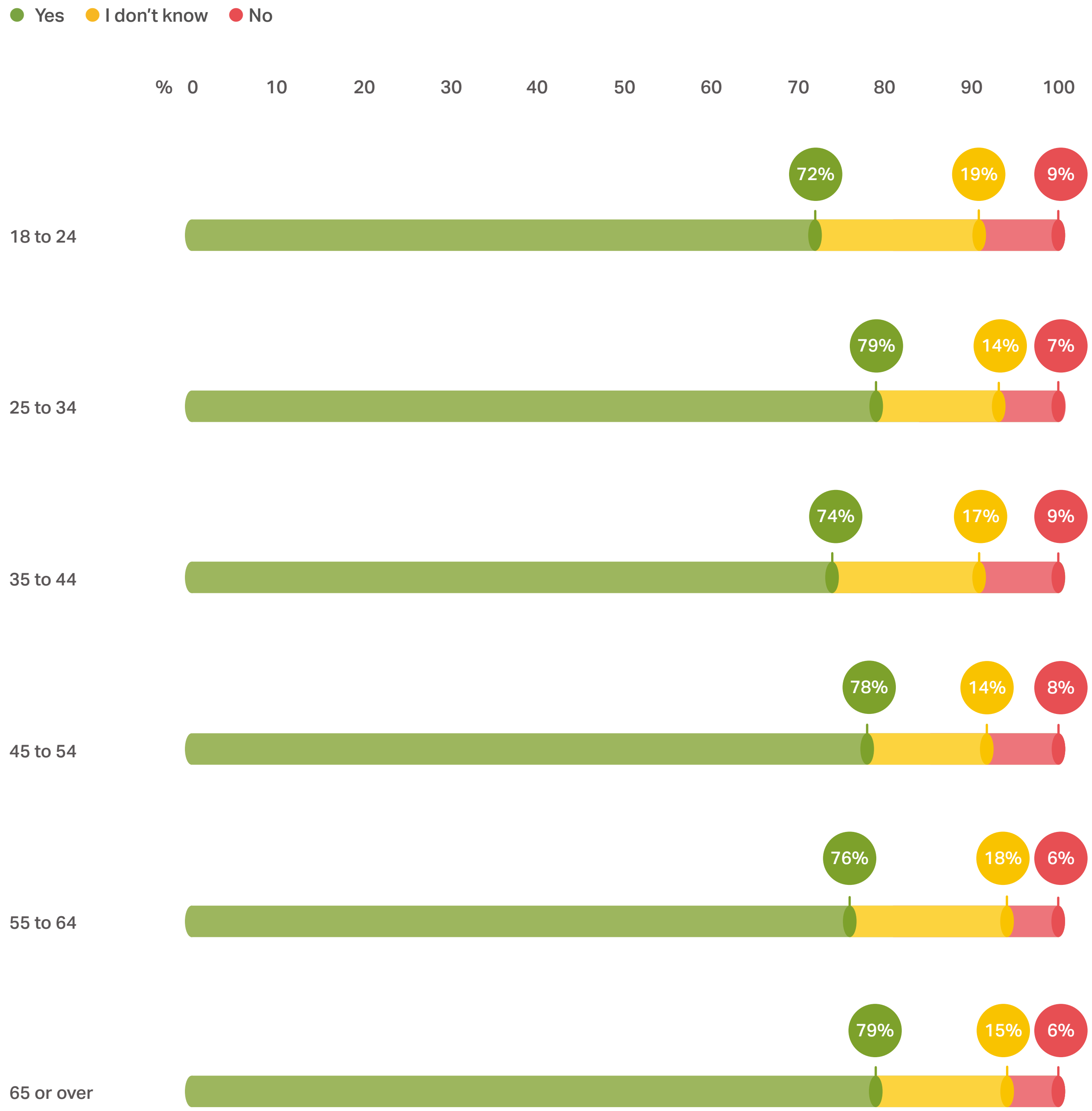
of those who would consider switching sectors cite opportunities for career progression as the primary driver.

In Young's view, the renewables sector has so much going for it. But it must be conscious of, and respond to, the challenges facing the energy sector as a whole. "That includes competing for a falling number of seasoned professionals and recent graduates," he says. "Employers should consider how best to create and communicate opportunities for graduates and apprentices as part of their talent programmes. It is a great sector to work in – but not enough people know that."

"Now that other sectors are pivoting towards cleaner energy, innovation is increasing elsewhere. Advances in electric vehicles or energy storage, for example, bring renewables and the power sector closer together."

– Janette Marx

IF YOU WERE ENTERING THE INDUSTRY NOW, WOULD YOU PURSUE A CAREER IN YOUR SECTOR?



Summary Renewables

The renewables sector has benefitted over the past year from the pivot by oil majors and others to cleaner energy. This has contributed to a strong public narrative and positive consequences in terms of capital availability and investment. But the sector is still affected by the reputation of energy as a whole.

This is especially true among the young people it needs to recruit to ward off a talent crisis. Greater emphasis on the innovative nature of the work, the role of automation and digitalisation, and the potential for individual career advancement can contribute towards an even stronger employment brand for the future.

GETI
Global Energy Talent Index

airswift
TRUSTED WORLDWIDE

energyjobline

Nuclear

Contents: Nuclear

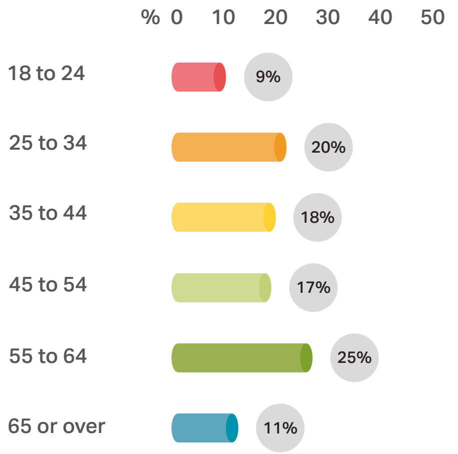
Nuclear

Nuclear has fared well this year. Despite project delays and cancellations, the industry is pressing on valiantly. With it, a sense of calm amongst the statistics. Professionals are confident, secure and focused on the task at hand.

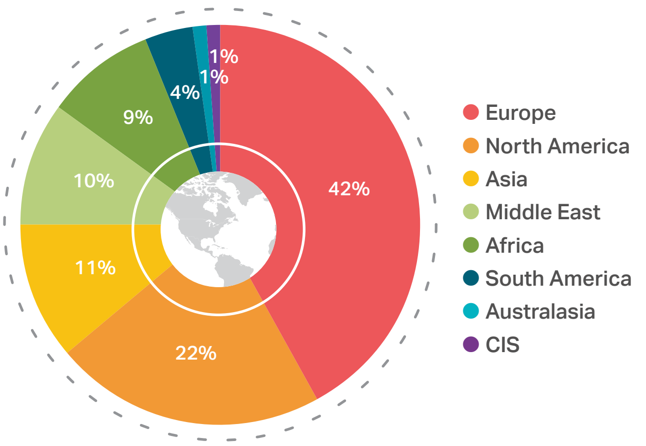
However, the precise nature of that task is up for debate.

1. DEMOGRAPHICS

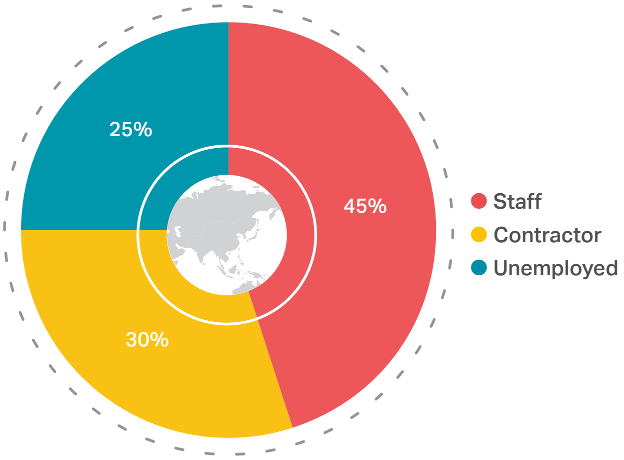
AGE



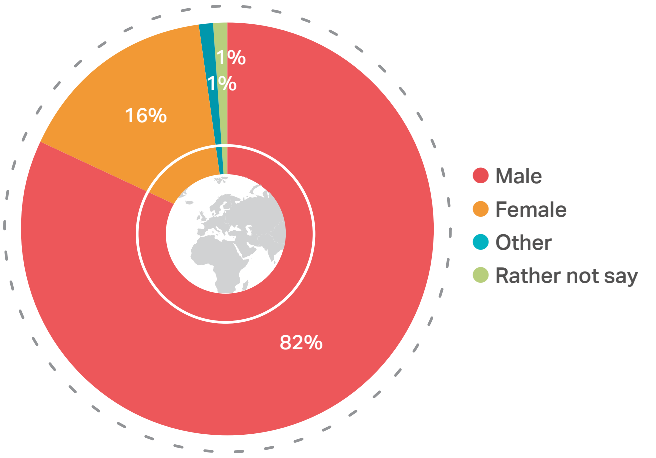
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

While, in light of COVID-19, the percentage of nuclear professionals reporting pay increases has dropped steeply year on year, from 54 per cent to 37 per cent in 2021, only 13 per cent report a decrease. This is the smallest proportion of any sector.

PERMANENT WORKER ANNUAL SALARY, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

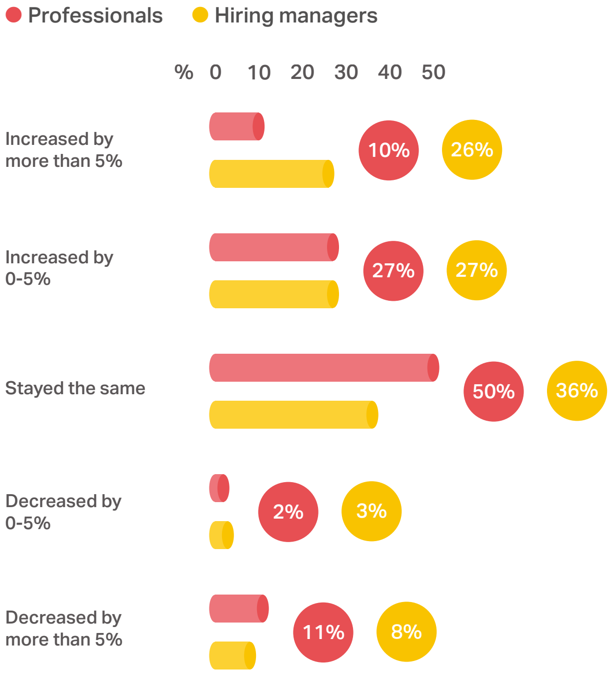
	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**56,095**	**49,665**	**70,446**	**48,590**	**58,385**	**49,575**	**49,307**	**78,671**
Business Development Manager	61,374	48,522	74,688	56,471	56,134	50,800	48,655	81,831
Chemical Engineer	60,471	50,337	70,438	42,580	56,653	44,800	45,269	82,151
Commercial Manager	51,068	63,246	88,664	46,589	74,780	76,800	60,528	97,313
Commissioning Manager	67,998	67,948	78,096	53,990	77,990	51,500	70,370	102,185
Construction Manager	67,740	57,614	82,838	50,824	64,426	59,000	57,457	89,565
Electrical Engineer	63,638	50,614	79,747	48,726	63,585	51,200	52,818	88,010
Environmental Engineer	50,122	44,462	62,770	37,419	49,296	42,800	43,503	68,610
Facilities Manager	53,789	45,731	62,958	53,648	52,393	43,600	48,041	73,741
HSE Manager	58,766	48,355	78,594	50,824	67,568	53,500	47,269	81,626
Maintenance Engineer	60,196	45,202	70,367	43,244	52,083	53,800	48,462	76,862
Mechanical Engineer	55,836	42,285	68,886	40,950	58,321	49,600	51,540	76,456
Nuclear Engineer	52,806	60,435	71,828	44,141	64,711	41,000	53,550	79,587
Planner/Scheduler	49,227	41,373	59,438	36,689	43,387	36,500	41,477	66,099
Process Engineer	62,073	51,394	79,038	47,417	61,844	48,700	54,914	86,607
Project Manager	63,820	54,987	78,919	62,118	66,795	58,600	57,845	85,482
Purchasing Manager/ Buyer	48,940	38,672	58,016	56,471	51,793	58,000	42,373	63,675
QA/QC Manager	60,530	53,712	72,753	62,118	60,950	42,500	51,013	81,183
R&D Scientist	48,990	45,225	59,514	36,574	48,305	44,600	37,496	70,212
Supply Chain Manager	44,176	45,118	61,855	70,589	57,922	38,400	39,099	67,889
Training Coordinator	40,344	38,062	49,509	30,426	38,761	45,800	34,454	54,339

CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	**376**	**381**	**497**	**278**	**444**	**282**	**378**	**575**
Business Development Manager	405	386	534	236	427	306	375	586
Chemical Engineer	385	374	477	263	414	245	342	581
Commercial Manager	355	462	600	330	532	580	448	677
Commissioning Manager	447	499	555	384	573	290	510	735
Construction Manager	451	440	585	261	491	290	442	667
Electrical Engineer	441	390	549	307	468	280	406	647
Environmental Engineer	315	353	446	217	374	115	338	511
Facilities Manager	365	359	456	224	407	249	375	531
HSE Manager	394	382	554	318	516	218	367	564
Maintenance Engineer	401	357	503	312	405	215	367	555
Mechanical Engineer	364	326	466	282	433	290	377	584
Nuclear Engineer	349	425	512	296	477	295	397	597
Planner/Scheduler	343	329	426	275	353	189	332	486
Process Engineer	417	387	550	292	469	260	415	646
Project Manager	420	410	538	269	514	319	432	638
Purchasing Manager/ Buyer	348	324	430	285	413	340	349	479
QA/QC Manager	407	408	508	259	471	230	389	606
R&D Scientist	348	359	428	266	375	390	302	518
Supply Chain Manager	311	354	437	295	446	340	314	491
Training Coordinator	261	303	382	187	315	190	287	402

And, with 53 per cent of hiring managers reporting that pay overall rose over the past year, it is perhaps unsurprising that nuclear respondents seem relatively unfazed by the events of 2020.

PAY CHANGES IN THE LAST 12 MONTHS



Indeed, professionals (51 per cent) and hiring managers (60 per cent) alike are optimistic of a pay increase next year, with nearly a quarter of professionals expecting to see an increase of more than five per cent. Somewhat surprisingly, this leaves nuclear professionals only slightly more optimistic than their oil and gas counterparts, 49 per cent of whom anticipate seeing a rise in their own pay.

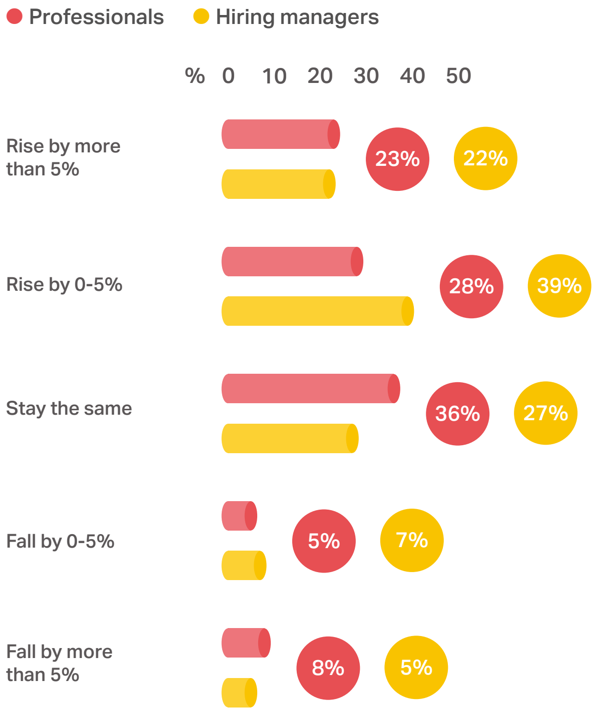
37%

of professionals report an increase in pay this year, while 13 per cent report a reduction.

Josh Young, Director of Energy Jobline, suggests that this may be down to the slightly different opportunities shaping the sector: "The skills gap that is driving up salaries elsewhere in the industry is not being felt so acutely by nuclear. Instead, it's the incoming investment and the creation of jobs on the horizon that is spurring the prospect of new opportunities for pay and progression."

> *"The skills gap that is driving up salaries elsewhere in the industry is not being felt so acutely by nuclear. Instead, it's the incoming investment and the creation of jobs on the horizon that is spurring the prospect of new opportunities for pay and progression."*
>
> ***– Josh Young***

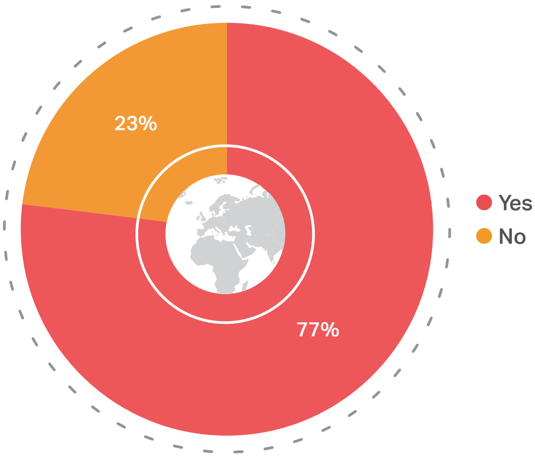
PAY EXPECTATIONS FOR THE NEXT 12 MONTHS



3. GLOBAL MOBILITY

Once again, nuclear respondents are the least open to relocating to another region for work. Seventy-seven per cent say they would consider relocating in comparison to 88 per cent of respondents across all sectors. "Expats make up much less of the nuclear workforce," Janette Marx, CEO of Airswift explains. "Countries have a vested interest in ensuring local citizens have the skills needed to run these complex plants, and the steady pace of the industry attracts families to settle."

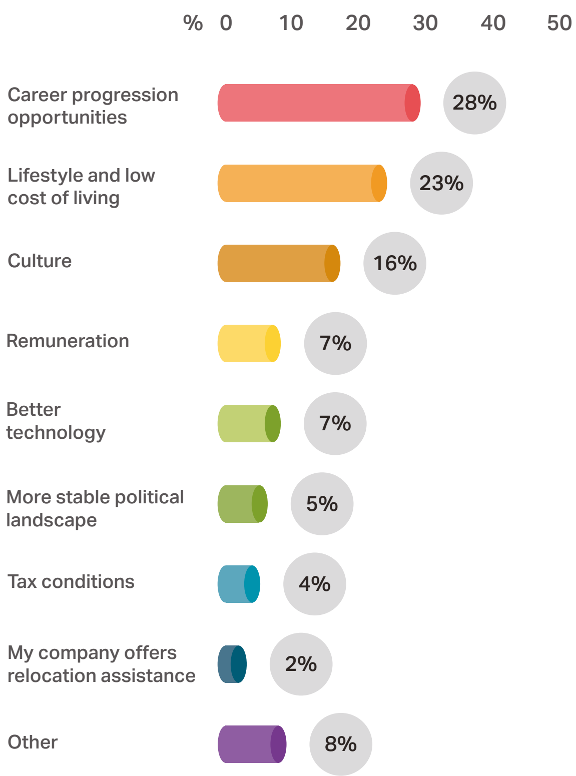
WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



For those that might consider relocating, Europe and North America top the desirability leader board for 24 per cent of respondents. South America and the Middle East trail with 14 per cent and 13 per cent respectively. "This pushes the Middle East back out of the top three" notes Young. "We saw interest pique in the region last year, however its tax haven status is in decline, eroding the edge it has for attracting talent."

A little under a third of respondents (28 per cent) said that career progression is what might attract them to make a move, closely followed by lifestyle and low cost of living (23 per cent) – the highest score for lifestyle across all sectors this year.

WHAT IS YOUR MAIN REASON FOR BEING ATTRACTED TO A NEW LOCATION?



For those that said they would not consider a long-distance move, 40 per cent indicated maintaining their family life as a priority, with 12 per cent highlighting their child's education. A further 12 per cent said that they simply did not see sufficient opportunities for long-term career development through relocating.

"The onus on lifestyle and the narrow gap between that and career progression sets nuclear apart," Marx remarks. "Nuclear employees tend to be more interested in striking a balance between career progression and their homelife. This can make it challenging to persuade potential employees to relocate if it is going to materially alter the way they live. So, it's also unsurprising to see culture gain its highest score from nuclear professionals at 16 per cent, versus an 11 per cent average across sectors."

4. AN UNCERTAIN FUTURE?

Despite its steady profile, a tumultuous year finds nuclear near the bottom of the table for growth. Only 23 per cent of respondents report 'strong' growth in the sector – putting it only slightly ahead of oil and gas. More positively, when asked whether the sector had grown at all, 55 per cent of respondents said that it had.

55%

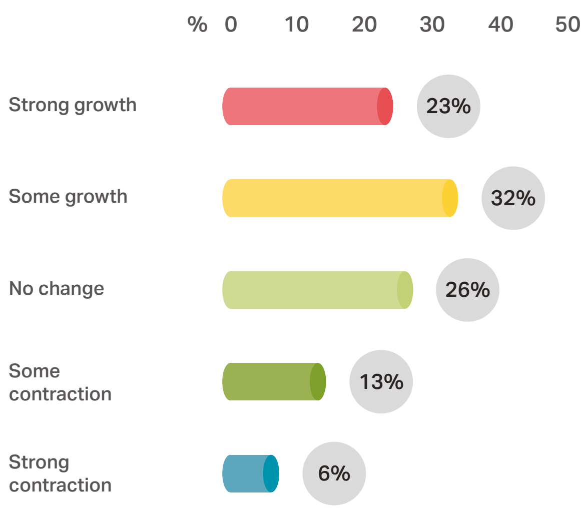
of respondents think the sector has grown over the past year. Nineteen per cent think it has contracted.

On the other hand, 19 per cent suggest that nuclear has contracted – a possible reflection on the cancellations of some projects says Young: "Project pipeline news over the past twelve months has been mixed with some regions faring better than others. There's a lot to be excited about but given the 2020 rollercoaster ride, this may be too far out to give the industry that immediate buzz that comes with growth."

"It's never been a booming sector, but it is certainly getting busier. Nuclear is a key part of many governments' clean energy strategies and consequently we've noted a steadier stream of investment and jobs."

– Josh Young

HOW STRONGLY HAS YOUR SECTOR GROWN OR CONTRACTED OVER THE PAST YEAR?



In better news, the industry reports feeling optimistic for the future, with 64 per cent expecting growth over the next three years (falling slightly to 61 per cent of hiring managers against 66 per cent of professionals) and just over a quarter (26 per cent) expecting strong growth. Only 16 per cent expect the sector to contract.

19%

of respondents believe that the sector has contracted over the past year.

"It's never been a booming sector," remarks Young, "but it is certainly getting busier. Nuclear is a key part of many governments' clean energy strategies and consequently we've noted a steadier stream of investment and jobs. As an example, the UK's Sizewell C will create 25,000 new jobs over the next few years. Projects like this will be a real turning point for the industry."

Underlining the focus on securing investment for the sector's future, availability of capital is considered the most important challenge facing the sector over the next three years (45 per cent). COVID-19 and public health concerns are close behind, cited by 44 per cent of respondents, but it is notable that nuclear is the only sector where this doesn't rank as a clear number one.

Considering the biggest opportunity for the sector, nearly seven in ten (68 per cent) pointed to advances in engineering techniques and technologies.

"There is some tension around the future of nuclear. Billions of dollars of investment is needed for the clean energy transition, however, the workforce is divided on whether they will benefit."

– Janette Marx

Notably, respondents are quite evenly divided on whether the wider economic outlook represents an opportunity (46 per cent) or a challenge (40 percent) to the nuclear sector. Respondents also disagree on the implications of the transition to sustainable energy for nuclear, with 45 per cent denoting it as an opportunity and 24 per cent saying that it represents a challenge.

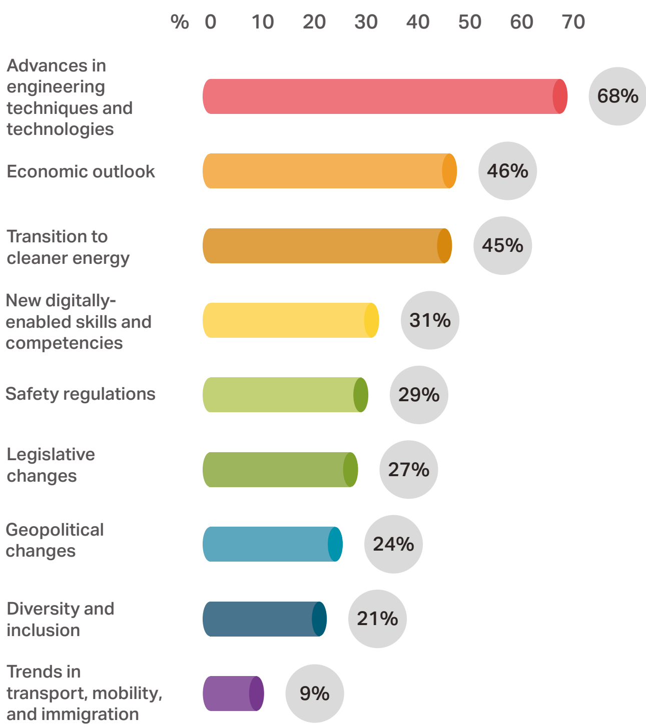
45%

of respondents rank the availability of capital among the biggest challenges facing the sector.

68%

of respondents view advances in engineering techniques and technologies as one of the most important opportunities facing the sector.

WHICH OF THE FOLLOWING ARE THE MOST IMPORTANT OPPORTUNITIES FACING YOUR SECTOR OVER THE NEXT THREE YEARS?



"There is some tension around the future of nuclear," notes Marx. "Billions of dollars of investment is needed for the clean energy transition, however, the workforce is divided on whether they will benefit."

5. BUILDING RESILIENCE

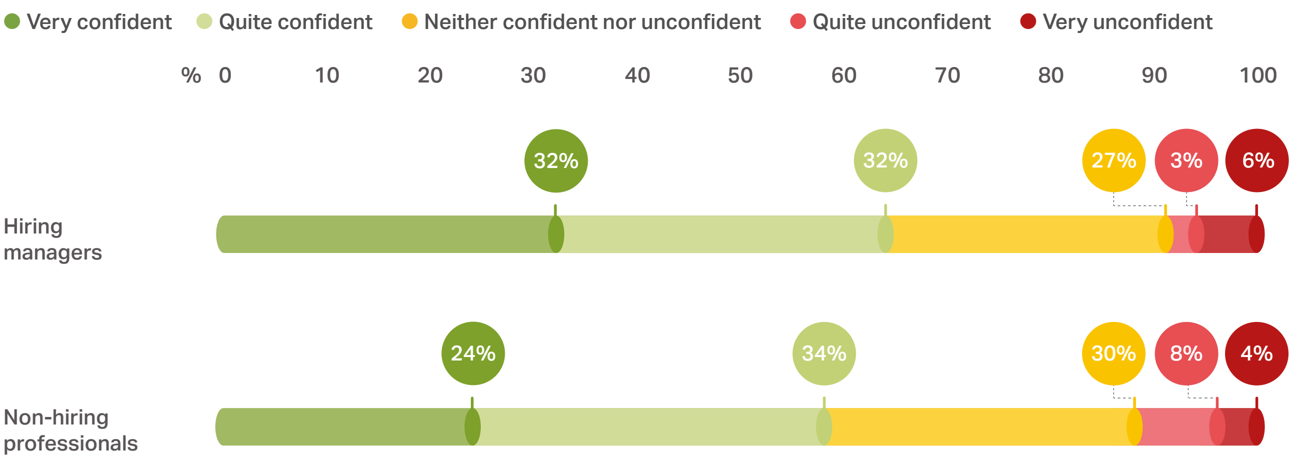
Whatever the future holds, many in the sector are confident in its resilience, with 60 per cent of respondents feeling positive about how their firm is handling the turbulence created by COVID-19. Only one in ten report a lack of confidence.

Confidence rises among those on who tend to have greater strategic insight, with 64 per cent of hiring managers describing themselves as confident against 58 per cent of professionals.

60%

of respondents are confident that their firm is resilient to the challenges it faces.

HOW CONFIDENT ARE YOU THAT YOUR EMPLOYER IS RESILIENT TO THE CHANGES IT HAS FACED AND WILL FACE IN THE FUTURE?



Aligned with the industry as a whole, 43 per cent of respondents say employers should increase training and mentorship to build business resilience. Adoption of automation and digitalisation technologies is also popular with 38 per cent, alongside workspace flexibility (37 per cent).

Encouragingly, this lines up with the measures companies are undertaking: workspace flexibility takes pole position with over a third (37 per cent) of companies implementing it – the highest proportion of any sector, and a further third (34 per cent) increasing training and mentorship programmes.

"It was striking to see the extent and speed at which the nuclear industry created flexibility within its operations. However, a vast gap for digitalisation remains. Respondents suggest this is where the biggest opportunity lies, but less than half of companies responded to recent disruption with digital measures," Marx highlights.

"It was striking to see the extent and speed at which the nuclear industry created flexibility within its operations. However, a vast gap for digitalisation remains."

– Janette Marx

MEASURES RESPONDENTS WANT VS MEASURES COMPANIES ARE TAKING

6. A NEW NORMAL?

In a surprise twist, despite nuclear professionals recording the highest levels of workspace flexibility in response to COVID-19, over one in five think their workplace will eventually return to normal – a higher percentage than in any other sector. On the other hand, nearly half (47 per cent) feel a "new normal" is already in place.

65%

expect flexible working to form a part of their working lives going forward.

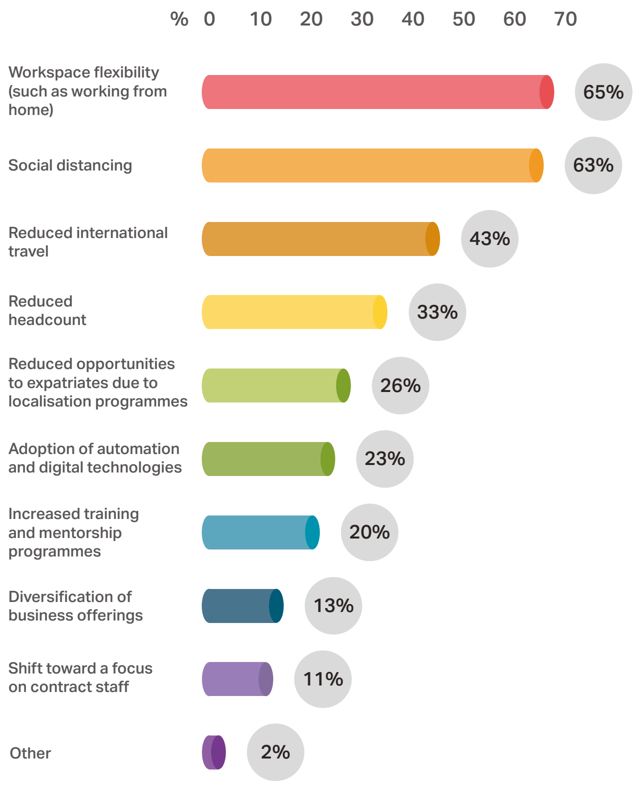
For those expecting a different way of working to become the norm, the continuation of workspace flexibility stands out. Sixty-five per cent of respondents expect it to form a part of their working lives going forward – the highest percentage among any sector. Professionals also expect to continue with social distancing (63 per cent) and reduced international travel (43 per cent).

"In nuclear the work environment is structured in a way that doesn't lend itself to reducing headcount. As an industry, it's quite resilient to challenges."

– Janette Marx

"It's possible that the higher percentage of women in the industry has nudged the expectation for workspace flexibility above its peers," says Marx. "However, we can also point to the heightened interest in work-life balance that we see from nuclear professionals – an ambition that is shared regardless of identity."

WHAT IS THE NEW NORMAL FOR YOUR SECTOR?



Nuclear professionals also seem less worried about staffing changes than in other sectors, with only a third expecting to see reduced headcounts and only 11 per cent expecting to see a greater emphasis on contract staff – the lowest figures of any sector.

"We've seen most sectors turn to cost cutting as a way to build resilience against the pandemic," Marx explains, "but in nuclear the work environment is structured in a way that doesn't lend itself to reducing headcount. As an industry, it's quite resilient to challenges."

In further good news, only one in five nuclear professionals say the transition to clean energy has decelerated. "It's encouraging that professionals from all sectors report positive progress on the transition. However, the results also suggest that the energy transition may not be being felt as strongly in nuclear as it is elsewhere. Do some nuclear professionals feel left behind?" Young asks.

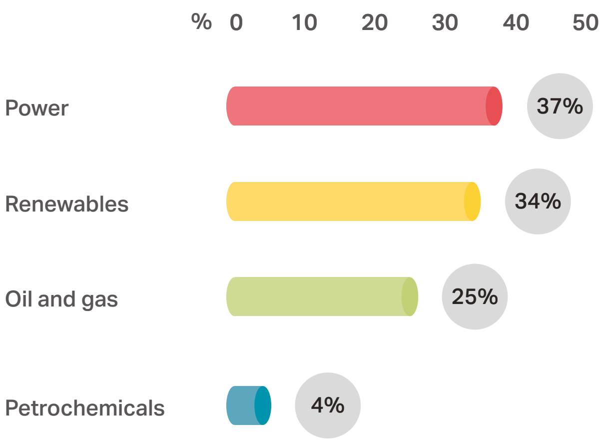
7. ATTRACTING AND RETAINING TALENT

Fifty-six per cent of nuclear respondents are worried about an impending talent crisis – a sizeable increase on the 47 per cent who reported such concerns in GETI 2019.

"We've seen some great sector-specific PR recently, making roles in nuclear more appealing, but there are still not enough skilled graduates entering the energy industry as a whole, let alone coming into nuclear, to ease these concerns," Marx says.

Seventy-seven per cent of respondents said they would consider switching to a role in a different sector, with power an ever-popular choice and renewables a close second. The interest in a role in oil and gas appears to be waning however – down to 25 per cent from 30 per cent last year.

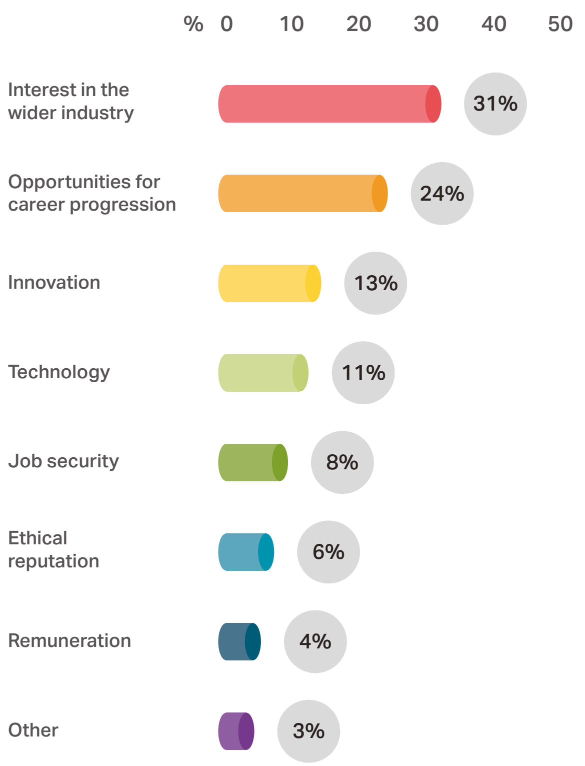
IF YOU WOULD CONSIDER SWITCHING SECTORS, WHICH SECTOR WOULD YOU BE MOST INTERESTED IN SWITCHING TO?



Despite the interest, neither Marx nor Young have seen many professionals take the leap from nuclear elsewhere. In this context, it is noteworthy that nearly a third of those who would consider making the switch cite interest in the wider industry as their primary motivator – the most popular reason given, followed by career progression.

"They put down roots where they work so if they don't have a local power or renewables industry, it's often not an option," Young says. "That partly explains why, relative to other energy sectors, so few in nuclear express interest in a switch."

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?

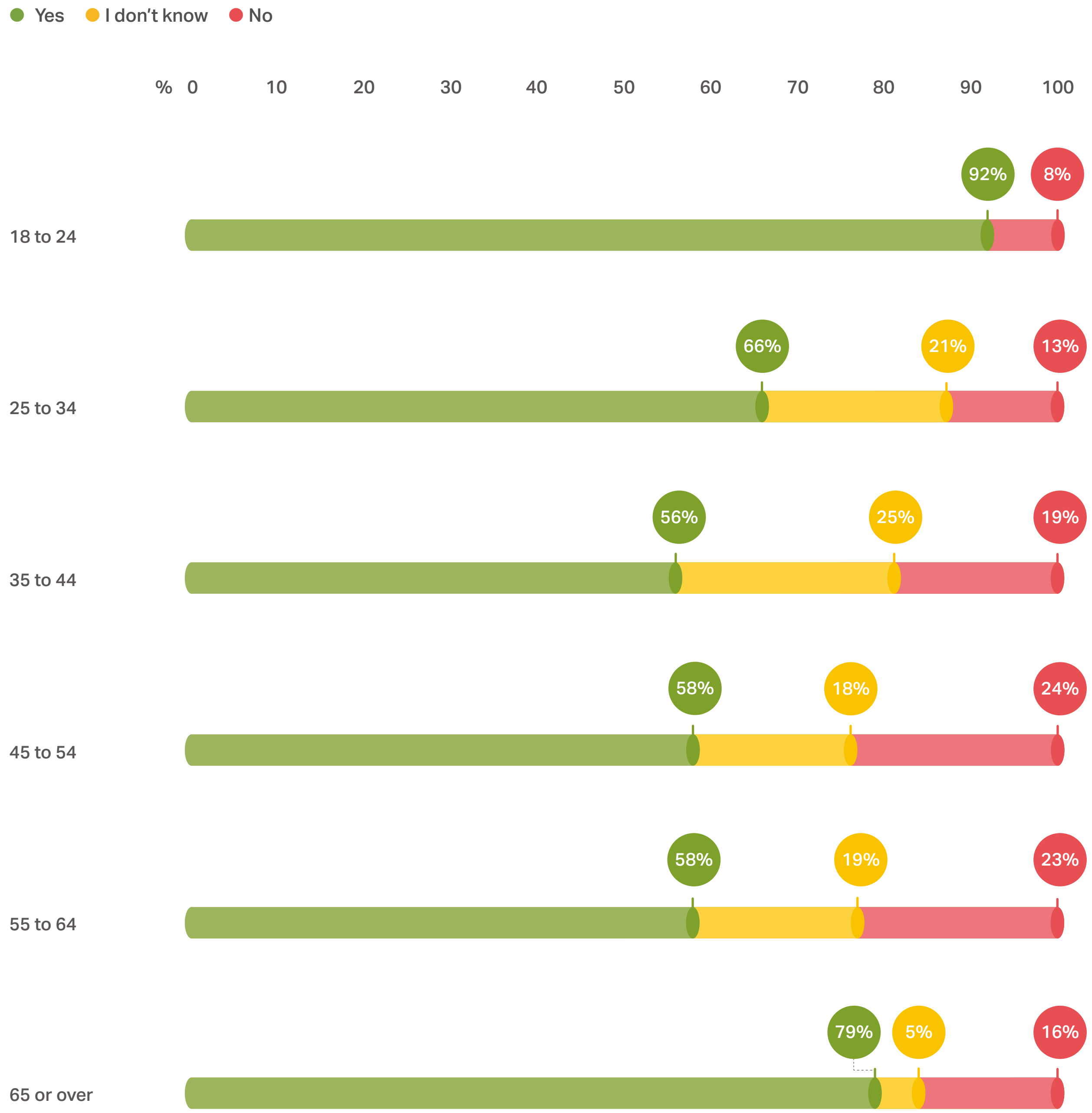


While 59 per cent of nuclear professionals feel less secure in their jobs than last year, the two in five who disagree represent the largest such cohort of any sector. Of those who do feel less secure, 56 per cent attribute this to the pandemic. Concern around the pandemic rises steeply, to 74 per cent, among hiring managers.

Nevertheless, and encouragingly, professionals are just as enthusiastic about nuclear careers as they were two years ago, and 63 per cent would pursue a career in the sector if they were to enter the industry now. Only 19 per cent disagree.

Younger respondents are much more likely to respond positively, with 92 per cent saying they would enter the industry again. "Big graduate employers have been doing a fantastic job of highlighting the opportunities that are available and creating a buzz around careers in STEM. Long may it continue," says Marx.

IF YOU WERE ENTERING THE INDUSTRY NOW, WOULD YOU PURSUE A CAREER IN YOUR SECTOR?



Summary
Nuclear

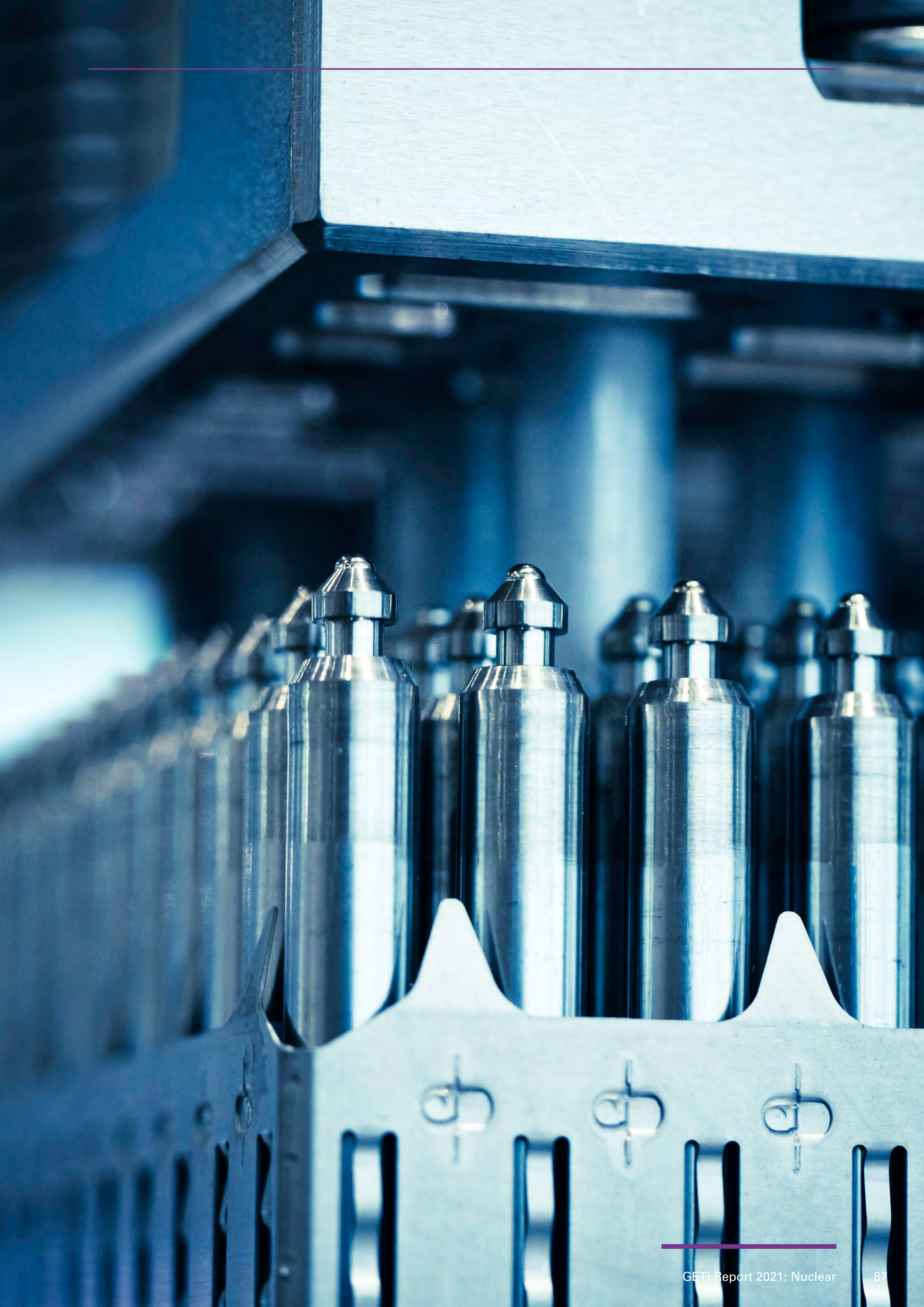
Nuclear professionals seem less impacted by COVID-19 – many received pay increases and feel securer in their roles than in other sectors. However, a question remains as to whether the industry has done 'enough' to ward off the impending skills gap, but it is encouraging to see how positively younger employees feel about the sector.

Furthermore, this year's results reveal a gap between the opportunities that professionals see for digitalisation and the actions being taken, suggesting the industry's next big challenge may be ensuring it does not get left behind by digital transformation.

GETI
Global Energy Talent Index

airswift
TRUSTED WORLDWIDE

energyjobline



Summary

COVID-19 may be a near-unprecedented global challenge but it is far from the only issue facing firms over the coming months and years.

Economies have shifted to meet the demands of public-health strategies and new ways of working alike. Many within the energy industry are now deemed essential workers, throwing a spotlight on both the necessity of the energy sector, and the ways in which it needs to evolve to meet societies' changing expectations.

The pandemic has been a huge shock to economic life. And, like all businesses, organisations across the energy mix must deal with widespread economic uncertainty, large-scale geopolitical shifts, and an exceptionally fragile oil market. That is before we even consider the energy transition, for which popular and political demand continues to grow – even as some of the world's biggest oil majors announced a pivot away from hydrocarbons.

These challenges will continue to interact and intersect in new and unpredictable ways, disrupting and destabilising an industry facing plenty of uncertainty and doubt. It is all but impossible to say what the industry will look like in five years' time, let alone what bumps businesses might encounter in the next five months.

This uncertainty is reflected in this year's GETI report. But, like the underlying causes, that uncertainty manifests itself in different ways. For some it is a fall in salary, or the expectation of a fall, despite a looming talent shortage. For others it is reflected in reduced job security, despite faith in their own company's ability to withstand the storm, or a belief that the sector will grow. On the whole, people are more confident about their sector's prospects than they are about their own.

Furthermore, the obvious challenges aside, there is much to be positive about. Focusing solely on negative reaction obscures some more subtle truths. One of the most interesting findings in this year's report, and one that is reflected across all individual sectors, is that the biggest challenges are also seen as the biggest opportunities.

COVID-19 may be a near-unprecedented global challenge but it is far from the only issue facing firms over the coming months and years.

The respondents who feel that the economic outlook is a major challenge, for example, are matched by those who think it is an opportunity. The same is true of energy transition: out of current adversity comes the possibility of renewal, particularly when smart digital technologies and innovative engineering techniques are deployed.

That too is a theme emerging in this year's report: the confidence in technology and the role it plays in creating resilient businesses. The investments that the industry as a whole has made over the past few years have helped it shrug off its reputation for stasis and lack of innovation. That has inevitably filtered through to the workforce who increasingly see automation and adoption of digital technologies as opportunities to grasp.

The open question, however, is whether it has filtered through to the wider job market. The biggest threat of all remains a looming talent crisis. No sector is immune, and there are plenty of red flags around the entire energy industry's ability to build a pipeline of qualified young people willing to join and remain in the industry. As much as the workforce has embraced technology, it believes that securing the right people is the most important way to build resilience into the business.

To that end, current employees want more training and mentorship. As new technology and ways of working are incorporated into their daily operations, it is not an unreasonable demand. That in turn gives hiring managers a real opportunity to communicate their training and related programmes more effectively, to support a diverse workforce through changing work conditions, and to demonstrate how they currently meet employee's demands – and how they will continue to do so in the future.

There is also an opportunity for hiring managers and their colleagues to look beyond their own company – and their own sector. This year's report makes it abundantly clear that employees are not tied to their current sectors and are prepared to move to progress their careers where necessary.

The biggest threat of all remains a looming talent crisis. No sector is immune, and there are plenty of red flags around the entire energy industry's ability to build a pipeline of qualified young people willing to join and remain in the industry.

The challenges faced are faced by all. As the distinction between individual sectors becomes more blurred, and demand for common experience and skill-set increases, there is a place for a cross-sector approach to securing talent. That approach starts at education and encourages greater STEM take-up to the benefit of the entire sector. It recognises that cross-sector training and experience can be immensely valuable. And it shows clearly and categorically that the entire energy sector has dynamic roles for dynamic individuals.

GETI
Global Energy Talent Index

airswift
TRUSTED WORLDWIDE

energyjobline