



GETI
Global Energy Talent Index



The Global Energy
Talent Index Report

2020



Welcome

Over the past three years, the Global Energy Talent Index (GETI) has grown into the definitive annual examination of workforce trends in the energy industry – encompassing the oil and gas, petrochemicals, power, renewables and nuclear sectors.

We identify original insights and draw fresh conclusions around the issues currently redefining how companies attract, retain and develop talent. The findings are always fascinating. For instance, last year respondents made one thing clear: they care about much more than money. In the competition for talent, energy firms may be used to competing solely on salary, but it is no longer enough.

We learned that, when it comes to their careers, other factors had risen up professionals' agendas, with career progression, flexible working benefits and the presence of cutting-edge digital technologies all having a part to play in firms' talent strategies over the years to come.

Or to put it more simply, to attract and retain talent, energy companies must seriously consider culture.

So, we're ushering in the new decade by doing just that. GETI 2020 features a comprehensive look at all aspects of the culture conundrum – from salaries and mobility to diversity and inclusion. And not only does it provide insight into how each sector is currently performing, but it also makes recommendations as to how the industry can get talent excited – and keep existing staff and contactors motivated for the long-haul.

Make no mistake, culture is mission-critical. It encompasses all elements of the experience

working within a company or a sector. And, as the market for talent gets ever more competitive, it has perhaps never been more important for firms to keep professionals engaged with their working lives. And, though on the surface energy firms appear to be performing well, there is little room for complacency:

- The energy workforce is a highly engaged one. Nine in ten professionals report being engaged with their careers, and more than half describe themselves as “very” engaged. This passion is a real asset to the industry and firms should do all they can to harness it.
- However, despite their engagement, energy professionals are unsure of the extent to which their employers value them. Only a third of respondents feel valued a lot, and more than half say that their companies either value them less than they should or don't value them at all.
- This matters. Three in ten respondents both doubt that their companies are loyal to their employees and doubt that they will remain with their organisation over the next three years. In a talent market that keeps getting more competitive, with professionals proving perfectly willing to switch roles or even sectors, persuading professionals that their futures lie with your organisation has perhaps never been more important.



Of course, some sectors have proven more progressive than others. But every sector has the ability to meet its workforce's needs – attracting and retaining the talent that will prove so essential to overcoming the challenges ahead. Some immediate actions that hiring managers across sectors can take include:

- **Prioritise progression:** progression has perhaps jumped slightly ahead of pay as the primary persuader for those deciding whether or not to leave their current job, yet employees are often unaware of the career progression opportunities on offer. Employers should make sure that all employees are working towards a clearly defined career plan if they hope to keep them over the long term.
- **Transform training:** a sizeable number of respondents doubt that their employers regularly invest in their training and development, with many of those who do receive training saying that it is focused on improving current performance – not future-proofing their careers. In part this may be down to a lack of communication around the courses that exist. However, there is also cause to consider whether the training on offer fully aligns with the way employees prefer to learn.
- **Develop diversity:** on the whole, the industry seems satisfied with their organisation's performance on diversity and inclusion, despite the lack of programmes and initiatives to encourage greater diversity within the business. However, with younger employees much less positive around this issue than their older peers, firms cannot afford to stand still. Just because the workforce is satisfied today, doesn't mean it won't quickly expect better tomorrow.

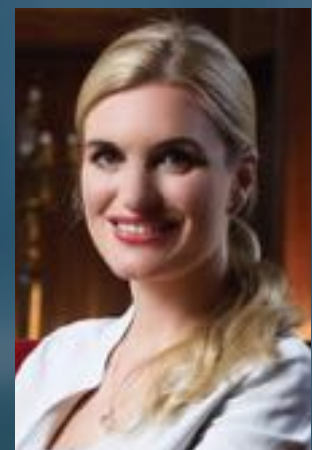
Every year, we develop GETI to allow energy businesses to steer a clear path over the rocky terrain of the industry's talent landscape. It is our hope that, having read our report, hiring managers feel better equipped to travel the road ahead of them, with a better sense of where they're going – and the recruitment and retention strategies they'll need to get there.

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*



*Hannah Peet,
Managing Director at
Energy Jobline*

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Methodology

This is the fourth 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 previous volumes, GETI 2020 encapsulates the views of 21,000 energy professionals, of 151 different nationalities and spread across 169 countries.

The 41-question survey was open for nine weeks and closed in October 2019, when it surpassed its response target, with the help of project sponsors and partners.

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.

THE CULTURE CONUNDRUM

GETI goes far beyond the remit of a standard salary survey and takes a close look at the critical issues and challenges facing the energy industry. In recent years, it has covered subjects such as global and sector mobility, the impact of digitalisation on the workforce, and the looming skills crisis.

Having laid such strong foundations, this year GETI builds on them, with a comprehensive look at organisational culture.

The industry faces a real challenge over the coming years in attracting and retaining the talent its ambitious and pioneering projects require. But it's not as simple as paying people more. Indeed, last year's GETI revealed that money is no longer the only major factor influencing energy professionals' career decisions. Culture, in all its forms, plays an important, albeit different, role.

But what sort of culture do energy professionals want? How satisfied are they with what's on offer? And how valued do they feel as a result? GETI seeks to help readers answer these questions and more, to prepare for success in a talent market that gets more complex and more competitive every year.

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 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



Energy Jobline

Energy Jobline is the leading specialist job board for energy globally, hosting a database of over 1.5 million professionals, paired with a client base of over 400 energy employers and agencies, advertising over 26,000 energy jobs and placing circa 4,000 professionals every month into new roles in the energy industry. Energy Jobline advertises exciting vacancies in the oil and gas, renewables, power, nuclear and petrochemicals sectors.

Energy Jobline is the pioneer of energy recruitment, hosting a 29 per cent exclusive database. Our job board is a significant value-add to any energy employer or employee on a global spectrum.

The subsectors we cover range from technical engineering to support/procurement. We have an engaged audience who use Energy Jobline for not only their job search, but also the latest energy news.

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



Partner Directory



Energy Voice is a global, digital news platform for the oil and gas, renewables and wider energy sectors. Based out of Europe's energy capital, Aberdeen, Scotland, Energy Voice is the authoritative voice on all North Sea developments and breakthroughs.

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



The Nuclear Institute is the professional membership body for the nuclear industry in the UK.

We work with individuals and companies to facilitate professional development and accreditation, nurture scientific expertise, share knowledge, and provide a place for the nuclear community to interact.

Join us and get involved in shaping the future.





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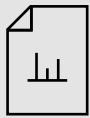


energyjobline

Oil and Gas



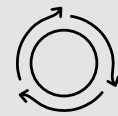
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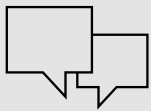
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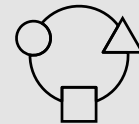
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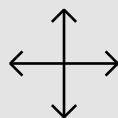
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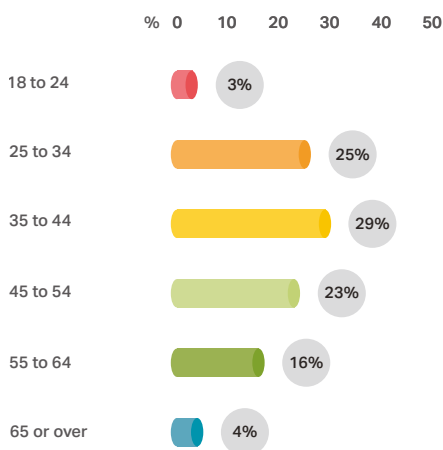


Oil and Gas

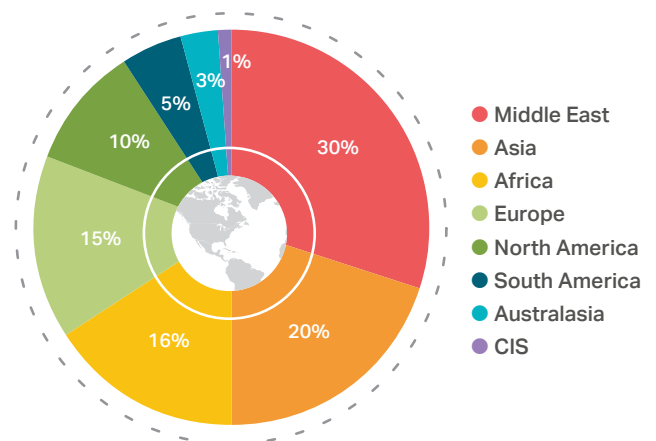
The oil and gas sector continues to gain in confidence and momentum as it shakes off the last symptoms of the downturn. Traditionally strong salaries are augmented by high workforce engagement and encouraging signs for young talent and gender diversity. However, companies can't afford to be complacent: the workforce is hungry for progression opportunities and eager for increased investment in training.

1. DEMOGRAPHICS

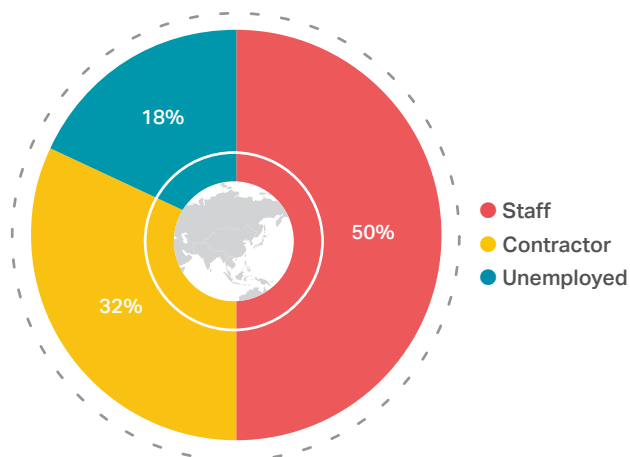
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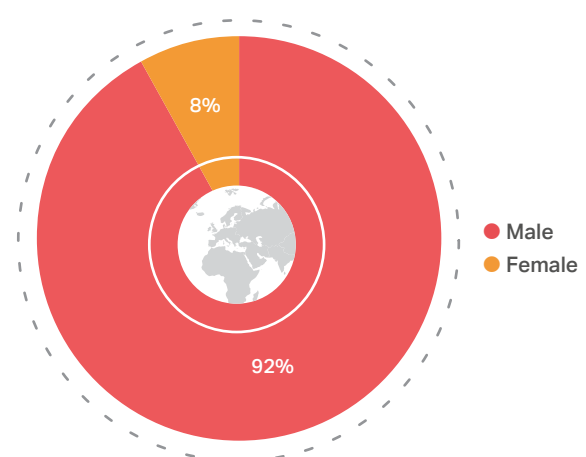
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

STRONG BUT STEADY

Oil and gas has traditionally been a sector of impressive salaries and this year was no different. However, precisely how well-rewarded has depended on the oil price.

Last year, with prices reaching \$80/bbl, optimism abounded: 65 per cent expected a pay rise this year, with 39 per cent expecting a bumper raise of more than five per cent.

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

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	92,006	73,371	141,074	38,997	82,498	48,125	79,664	112,878
Accountant	53,974	43,241	67,386	17,785	61,359	26,294	31,075	78,785
Administrator	28,230	32,274	36,880	9,959	30,828	22,029	15,124	37,319
Chemical Engineer	92,500	64,382	132,775	23,120	67,300	35,041	75,524	125,600
Civil Engineer	89,290	61,668	141,240	24,899	67,561	31,999	51,541	108,824
Commissioning Engineer	93,326	94,583	132,428	30,234	85,304	32,338	68,365	109,466
Construction Engineer	92,419	71,410	166,959	26,677	86,960	31,302	55,417	109,302
Construction Manager	100,693	90,075	179,800	53,353	89,583	51,057	112,015	120,314
Contracts Manager	92,864	67,705	148,267	65,802	80,884	59,706	108,000	96,812
Drilling Engineer	122,561	105,700	160,449	67,265	106,687	72,507	112,415	122,870
Drilling Supervisor	147,457	127,144	190,200	89,643	130,724	119,895	139,014	149,164
Electrical Engineer	86,130	74,176	121,994	30,234	79,439	53,735	79,736	115,653
Finance Manager	87,054	57,281	171,243	80,030	89,589	68,589	89,717	127,320
Geophysicist	90,795	78,507	185,984	30,222	95,887	67,257	118,400	124,764
HSE Manager	120,800	76,301	186,064	58,689	83,736	40,338	89,297	119,373
Inspection Engineer	75,600	64,178	100,585	24,187	75,618	48,314	68,911	109,484
Instrumentation Engineer	93,110	71,241	141,097	26,677	87,620	53,245	65,423	128,321
Maintenance Engineer	86,000	67,100	108,846	32,011	85,577	24,793	74,200	107,136
Mechanical Engineer	81,495	76,211	130,460	26,677	80,695	57,802	78,945	109,200
Process Engineer	90,460	74,158	166,637	24,899	77,520	40,632	78,467	126,203
Production Engineer	85,300	59,034	142,510	30,234	79,895	64,834	64,512	123,580
Project Engineer	97,470	71,257	147,987	33,790	83,416	33,673	70,174	121,892
Project Manager	124,700	87,412	175,212	71,138	94,796	49,347	119,507	120,004
QA/QC Inspector	78,550	74,862	100,191	19,563	79,454	30,722	69,924	104,800
Reservoir Engineer	120,300	107,919	129,945	53,660	109,719	59,959	133,600	149,686
Welder	69,080	36,455	161,700	24,187	52,299	27,725	22,301	76,073



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

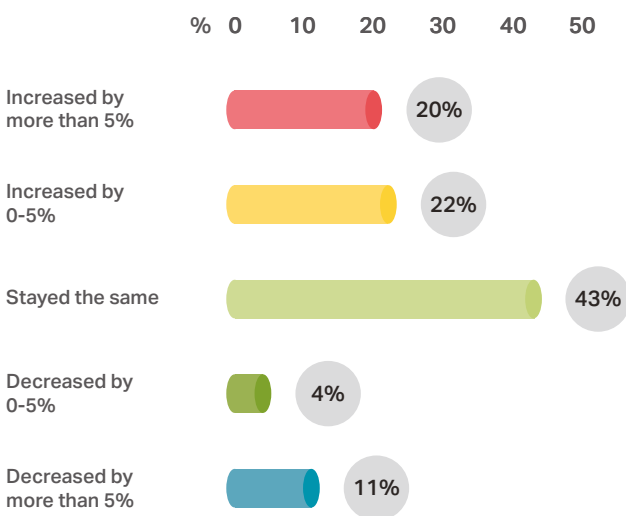
	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	568	579	675	244	639	345	599	821
Accountant	276	290	413	137	417	188	282	545
Administrator	88	129	140	74	150	155	100	237
Chemical Engineer	434	489	480	146	555	250	505	850
Civil Engineer	460	467	542	156	487	228	460	711
Commissioning Engineer	583	673	685	166	612	231	610	779
Construction Engineer	552	574	654	146	602	224	495	764
Construction Manager	856	689	762	292	731	365	710	860
Contracts Manager	654	649	618	468	662	494	675	762
Drilling Engineer	850	910	1,077	481	920	518	750	1,100
Drilling Supervisor	1,099	1,245	1,400	823	1,127	964	1,150	1,387
Electrical Engineer	532	593	587	166	611	383	584	808
Finance Manager	503	516	633	438	642	490	533	886
Geophysicist	695	638	788	236	746	463	800	843
HSE Manager	563	555	635	322	645	288	610	724
Inspection Engineer	432	489	478	132	639	243	473	744
Instrumentation Engineer	565	589	636	166	629	381	625	950
Maintenance Engineer	612	563	576	175	564	177	530	950
Mechanical Engineer	527	527	539	146	603	413	601	780
Process Engineer	586	651	728	137	670	290	615	1,000
Production Engineer	364	474	742	166	646	463	525	900
Project Engineer	612	661	703	185	713	240	660	855
Project Manager	770	775	860	390	816	352	775	819
QA/QC Inspector	554	575	589	107	568	220	607	800
Reservoir Engineer	638	486	910	325	784	394	954	932
Welder	399	260	700	132	445	198	337	543

With prices having subsided, reality played out slightly differently, with 42 per cent having actually seen a raise; 20 per cent by more than five per cent. Fifteen per cent saw their pay drop, 11 per cent by more than five per cent – more than any other sector in this year’s survey.

A cause for concern? Airswift CEO, Janette Marx, keeps a cool head: “The salary story in oil and gas is actually a positive one. Pay in the sector started at a high base and is now rising. Even if increases were below expectations, there is no cause for panic: oil and gas salaries are still the envy of many energy workers.”

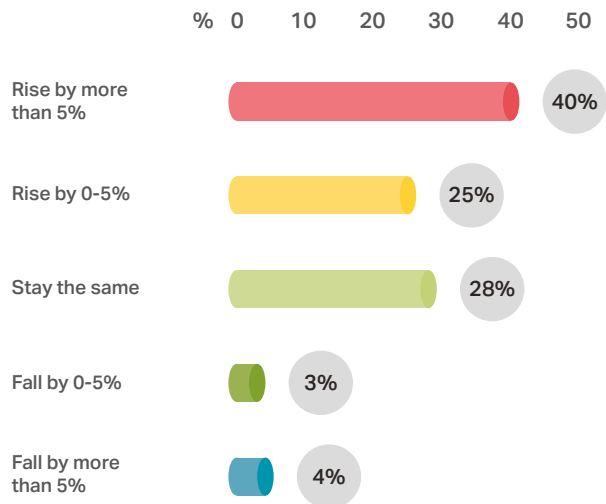
The pattern makes more sense when geography is considered: the Americas, where rig counts are down, are among the regions struggling the most with pay.

PAY CHANGES AMONG WORKERS IN THE LAST 12 MONTHS (non-hiring professionals)



Marx explains: “Shale play contractors such as those in the Permian saw high demand and pay increases as a result. Now they may find they’ve come to the end of their contract in a slightly lower oil-price environment, and the contracts available now are offering slightly lower rates. In Asia, for example, where the industry is in the flush of growth, it’s a very different story.”

PAY EXPECTATIONS AMONG WORKERS IN THE NEXT 12 MONTHS (non-hiring professionals)



Already well-remunerated, oil and gas workers are even more cheerful when asked to reflect on the future. Sixty-five per cent of professionals expect a raise this year, with 40 per cent eyeing pay increases above five per cent. Hiring managers report broadly the same expectations: 66 per cent and 40 per cent respectively.

Hannah Peet, MD at Energy Jobline, explains that this is encouraging news for professionals: “Hiring managers are the ones with their fingers on the pulse and we should expect them to be less hopeful and more realistic with their predictions. Judging by these results, they are just as optimistic as their employees, which is great news for oil and gas firms and professionals, and marks an improvement on last year’s salary predictions.”

65%
of professionals expect a raise this year, with 40 per cent eyeing pay increases above five per cent.

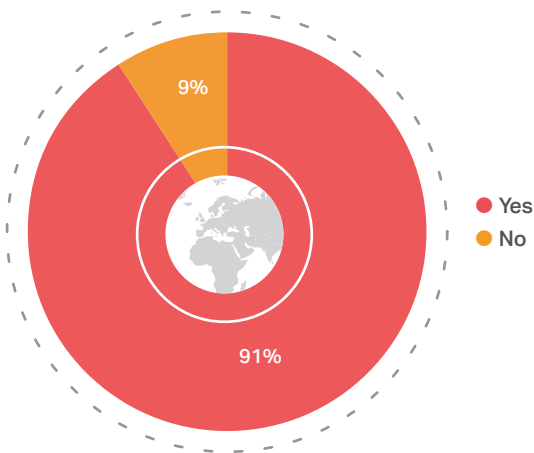


3. GLOBAL MOBILITY

EYES TO THE EAST

The oil and gas sector has long been a global one and its professionals are accustomed to international moves. Ninety-one per cent of respondents are comfortable relocating to another region for work – more than in any other surveyed sector, with career progression being by far the most common reason why one might consider a new region (42 per cent).

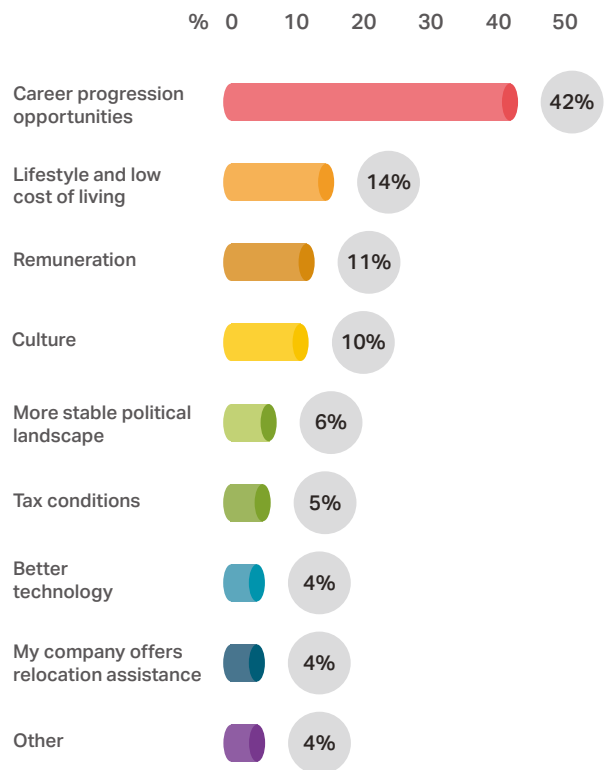
WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



As with last year, the Middle East is the most popular destination – though its allure has waned slightly, falling from 29 to 23 per cent. Europe and Asia make up the top three with 22 and 18 per cent respectively.

Peet is unsurprised: “The Middle East has a wealth of exciting and innovative projects lined up, so I for one can certainly vouch for its appeal. However, events such as the recent drone attacks in Saudi Arabia may explain the small knock in confidence. Europe remains as attractive a destination as ever, yet, the workforce seems to be increasingly drawn to the flourishing markets in Asia, with LNG becoming a vital alternative to traditional fossil fuels in the region. These are promising locations for ambitious professionals.”

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



However, Marx also spots a trend for companies to keep an eye on: “Of those not open to moves, 10 per cent say the opportunities just aren’t there to do so. That’s not what we’re used to hearing in oil and gas. Many companies have tightened their belts post-downturn, and perhaps fewer are willing to pay relocation costs – only 53 per cent this year said they offered cross-regional transfers – plus local content rules around the world are only getting tighter. Companies may have to take more care to ensure opportunities are there and apparent to talented employees.”

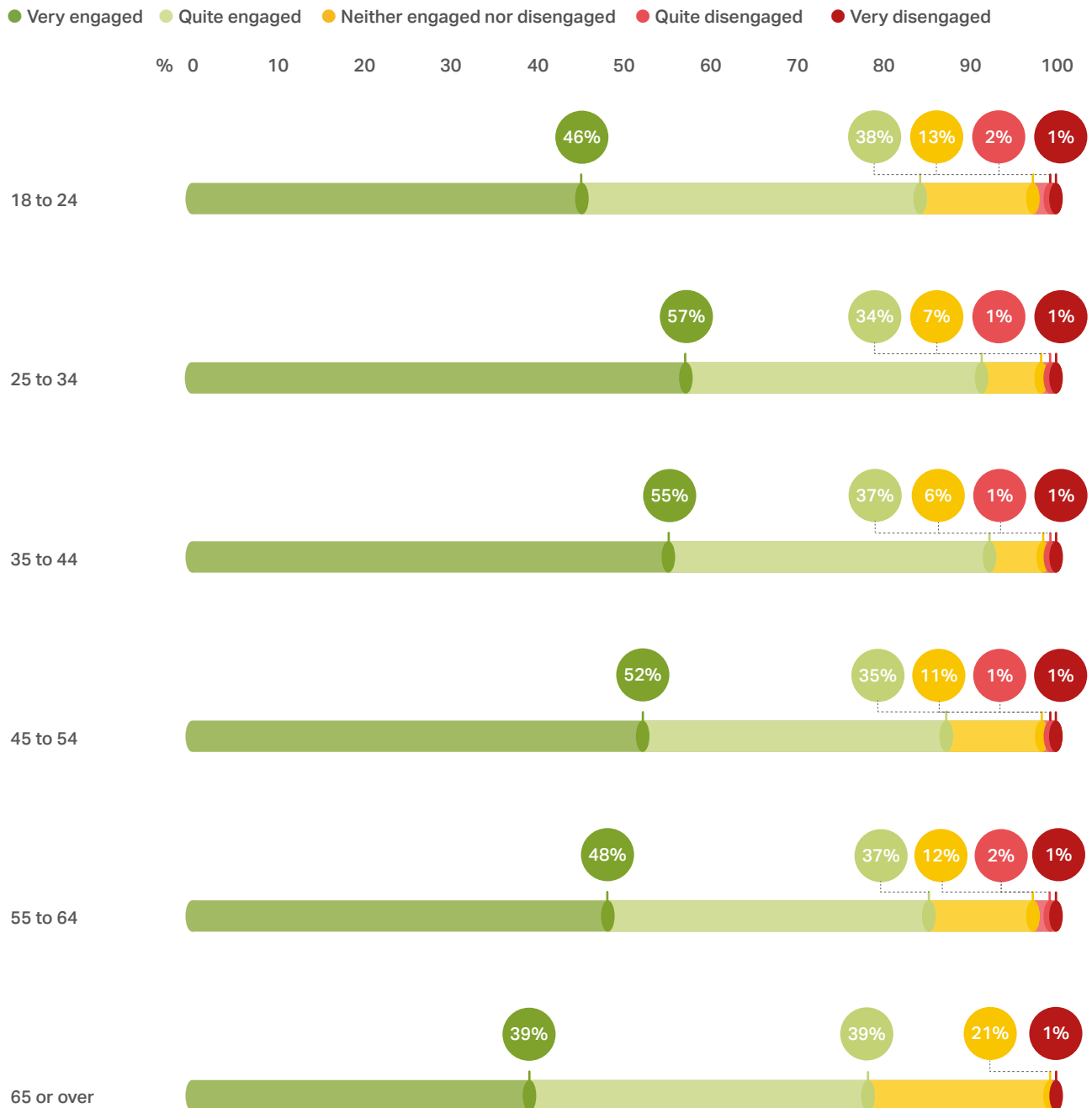


4. AN ENGAGING CULTURE?

The overwhelming majority of professionals (89 per cent) are engaged with their professional lives – 53 per cent go so far as to describe themselves as very engaged.

This peaks for those in the prime of their careers (aged 25-54), whose engagement reaches 90 per cent.

HOW ENGAGED ARE YOU WITH YOUR PROFESSIONAL LIFE?





This comes despite mixed feelings around how much their employers value them. Only 35 per cent feel their organisation values them a lot – less than any other sector. The largest group feels they are valued, but not as much as they should be (44 per cent).

However, younger professionals (up to 24 years old) are more likely (42 per cent) to say they are valued a lot than older colleagues (55 years or older, 32 per cent). In this, Marx sees cause to celebrate: “When the downturn hit, graduate schemes were often the first thing to go. That cut costs in the short term, but the sector has struggled to attract young people since. Recently, we’ve seen those schemes returning, and I think these results stem from that.”

When asked what contributes most to their professional engagement, employees point to a team that works well together (53 per cent); training, learning and development opportunities (43 per cent); and remuneration and benefits (37 per cent).

89%

of oil and gas professionals feel engaged by their professional lives.

Interestingly however, this varies between men and women – though both groups feel equally engaged. Women value learning and development slightly above team dynamics, and weigh flexible working opportunities almost equally with remuneration and benefits. Women are also more likely to value clear progression opportunities, while men are more concerned with the chance to work with cutting edge tools and technologies and with extended family leave.

Marx comments: “People expect flexible working to top the list for women in the sector, but our survey shows that this is merely an assumption. First and foremost, these women are professionals and value the things of most benefit to their career. Often these women are the breadwinners in their families and we shouldn’t be surprised to see them value

their careers accordingly. On the other hand, we see men prioritising better family leave, which is really encouraging for parity in the sector.”

And how do companies perform on these factors that drive engagement? Seventy per cent of respondents are satisfied with their organisation’s teamworking performance, yet they report less positively on their organisation’s performance when it comes to training and development and remuneration and benefits.

“People expect flexible working to top the list for women in the sector, but our survey shows that this is merely an assumption. First and foremost, these women are professionals and value the things of most benefit to their career.”

– Janette Marx

In both instances, only half are satisfied while a full quarter are dissatisfied. Even more concerning, only 41 per cent report satisfactory progression opportunities while 30 per cent are dissatisfied.

Peet adds: “Overall there is a positive story here of a highly-engaged workforce and one where women are dismantling gender stereotypes. However, we know that career progression is a constant factor that tempts people to move, so companies should consider if they are both providing and highlighting opportunities to their staff.”

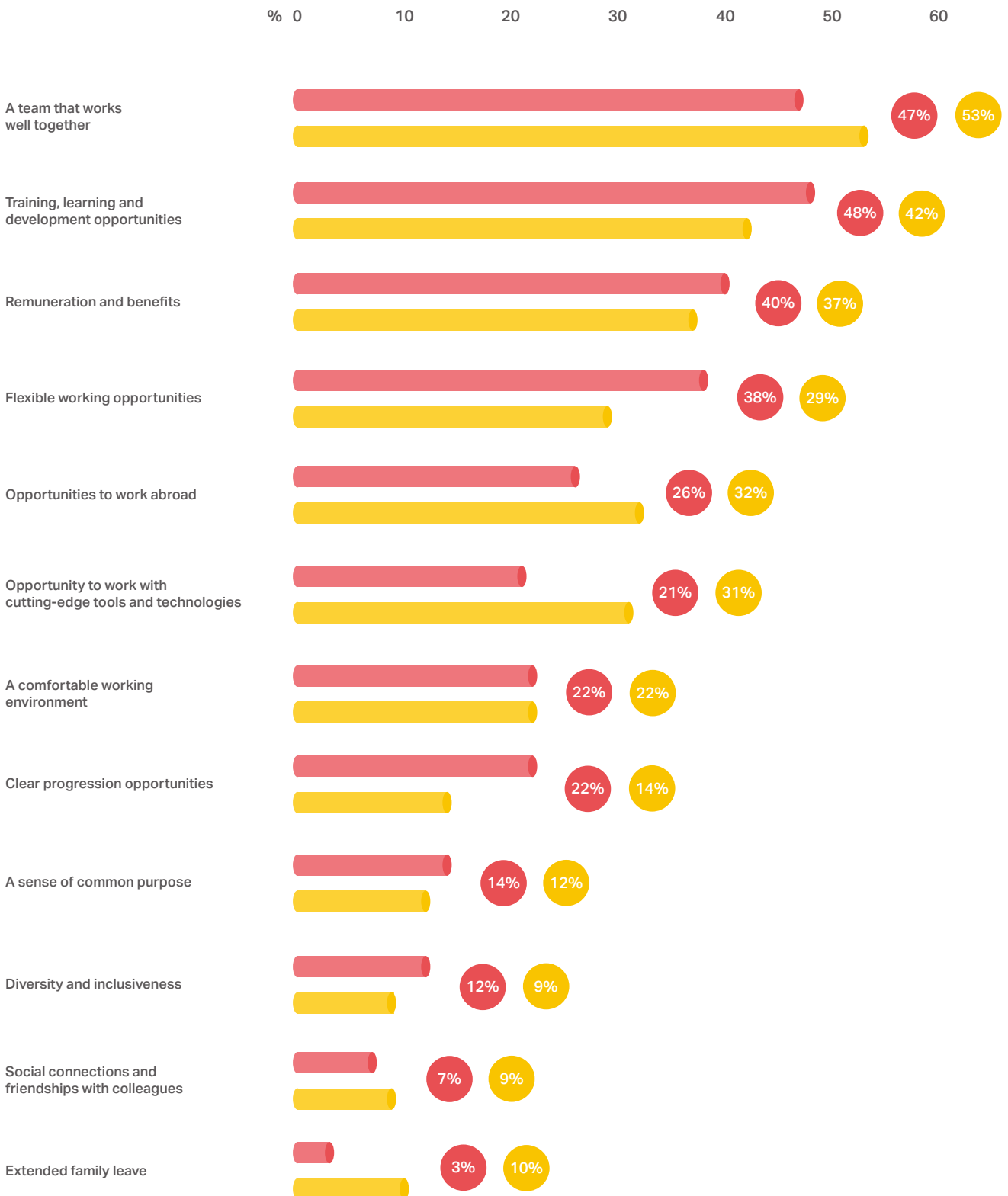
35%

of respondents feel their employer values them a lot – lower than any other sector.



WHICH FACTORS MOST AFFECT YOUR PROFESSIONAL ENGAGEMENT?

● Female ● Male





5. SKILLS AND TRAINING

REFLECTION REQUIRED

Forty-four per cent of respondents say that their company does not regularly invest in their training and development (though hiring managers are more positive) and close to a third (32 per cent) report no access to training with their current employer in the last year.

Peet argues that, “This may not be as worrying as it first appears. First, many people don’t view on-the-job shadowing and mentoring as training, so some training schemes often go unnoticed. Second, more hiring managers say there is training, and they should know, given their position. Possibly this is a perception issue and companies could do better at communicating their training schemes internally.”

Younger professionals are more likely to say they had received training – which fits with the fact that 68 per cent of those who do receive training say it is to improve their current job performance. Once professionals learn the ropes, training seems to decrease, which explains why fewer older professionals had received it, and why few training recipients say it was related to skills beyond their current job (18 per cent) or to further their career (14 per cent).

“Many people don’t view on-the-job shadowing and mentoring as training, so some training schemes go unnoticed.”

– Hannah Peet

The story on training methods is generally positive though. Those who received training had typically received instructor-led classroom training, self-paced online learning and leadership or development programmes. This corresponds with instructor-led training and leadership programmes being the methods respondents prefer to receive.

17%

of women are placed on leadership programmes, against 22 per cent of men.

However, there is a sting in the tail: women are less likely than men to be placed on leadership development programmes (17 per cent versus 22 per cent). For Marx, this must be rectified: “Humans being humans, potential future leaders are rarely identified on the basis of performance alone. Relationships matter and people relate more to those similar to themselves.

“With men dominating leadership positions at present, that puts women at a disadvantage. They need to invest more time in their relationships to overcome this, while companies should work to shift the focus to performance and address the imbalance.”

“Humans being humans, potential future leaders are rarely identified on the basis of performance alone. Relationships matter and people relate more to those similar to themselves.”

– Janette Marx



TRAINING PREFERRED VS TRAINING RECEIVED

● Training preferred ● Training received





6. DIVERSITY

SIGNS OF PROGRESS?

Two-thirds of employees feel that their organisation values the perspectives of people with different backgrounds and beliefs equally – and encouragingly

this is equally true of both men and women. Only 16 per cent disagree.

However, professionals are less convinced with age – a not entirely expected pattern.

DOES YOUR ORGANISATION VALUE THE PERSPECTIVES OF PEOPLE WITH DIFFERENT BACKGROUNDS AND BELIEFS EQUALLY?

● Yes ● I don't know ● No

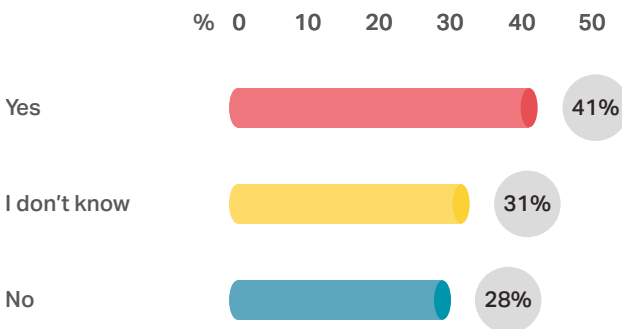




“The pattern that you might expect – and indeed that we see in other sectors,” explains Peet, “is that younger professionals would be less lenient with diversity performance, typically holding companies to higher standards on this front than their older peers. Here we see the inverse – perhaps a sign that the sector’s attempts to appeal to a broader range of new talent is resonating.”

Despite encouraging signs, fewer than half (41 per cent) of non-hiring employees say their companies have programmes or initiatives in place to improve diversity and inclusion. Twenty-eight per cent say there aren’t any and 31 per cent are unsure.

DOES YOUR ORGANISATION OFFER ANY DIVERSITY PROGRAMMES? (non-hiring professionals)



67%

of oil and gas professionals believe that their organisation values the perspectives of people with different backgrounds and beliefs equally.

Marx comments: “Again, this may partly be down to visibility. People have their heads down and don’t tend to notice these programmes unless they are directly touched by them. There will be more out there than people think. That said, still only half of hiring managers say programmes are in place, so there is certainly room for improvement.”

“The pattern that you might expect – and indeed that we see in other sectors, is that younger professionals would be less lenient with diversity performance. Here we see the inverse – perhaps a sign that the sector’s attempts to appeal to a broader range of new talent is resonating.”
 – Hannah Peet



7. ATTRACTING AND RETAINING TALENT

DON'T TAKE LOYALTY FOR GRANTED

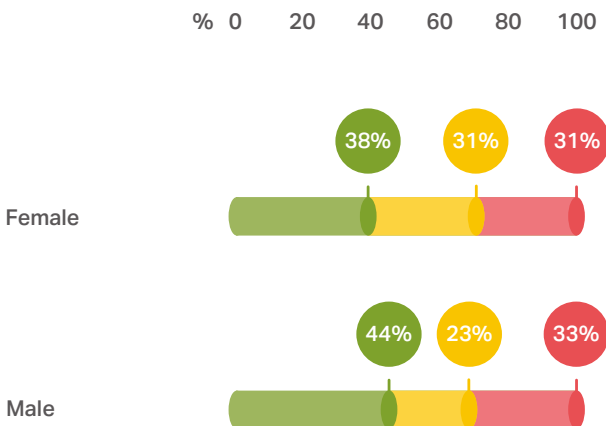
The oil and gas workforce is engaged – but is it loyal? The results suggest so: 44 per cent of employees think their organisation is loyal to them, whereas a third disagree. Though this compares poorly to other energy sectors, 42 per cent expect to remain with their organisation for the next three years and only 29 per cent expect to leave.

“Given that the sector has only recently really exited the downturn, these aren’t bad numbers at all. And though older professionals may still have vivid memories of cutbacks, younger colleagues are more positive,” says Marx.

Indeed, young professionals see more loyalty (54 per cent) than older peers (41 per cent). Men are also more confident on this front than women (44 per cent versus 38 per cent).

IS YOUR ORGANISATION LOYAL TO ITS EMPLOYEES?

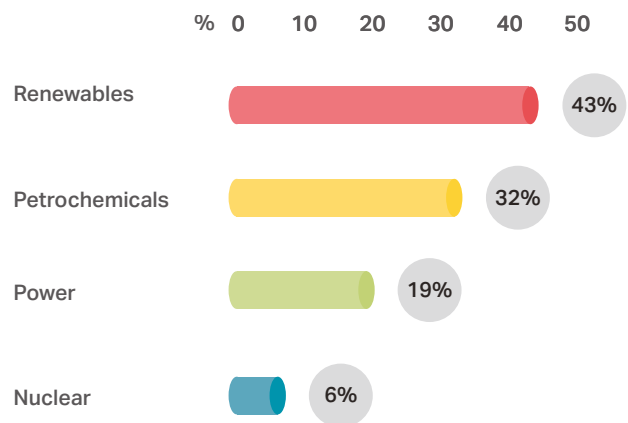
● Yes ● I don't know ● No



Motivating factors – as is the case across energy sectors – largely boil down to progression and rewards. Of those looking to leave, 66 per cent say a pay rise and 61 per cent say progression opportunities or new challenges would encourage them to stay. Of those prepared to stay put, 76 per cent would be tempted to leave for progression opportunities and 66 per cent for a salary increase.

While this might suggest that oil and gas professionals are easily swayed, only 73 per cent would consider switching to another sector entirely – a majority, but lower than any other energy sector. The most common reason why is opportunity for career progression.

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



“Given that the sector has only recently really exited the downturn, these aren’t bad numbers at all. And though older professionals may still have vivid memories of cutbacks, younger colleagues are more positive.”

– Janette Marx



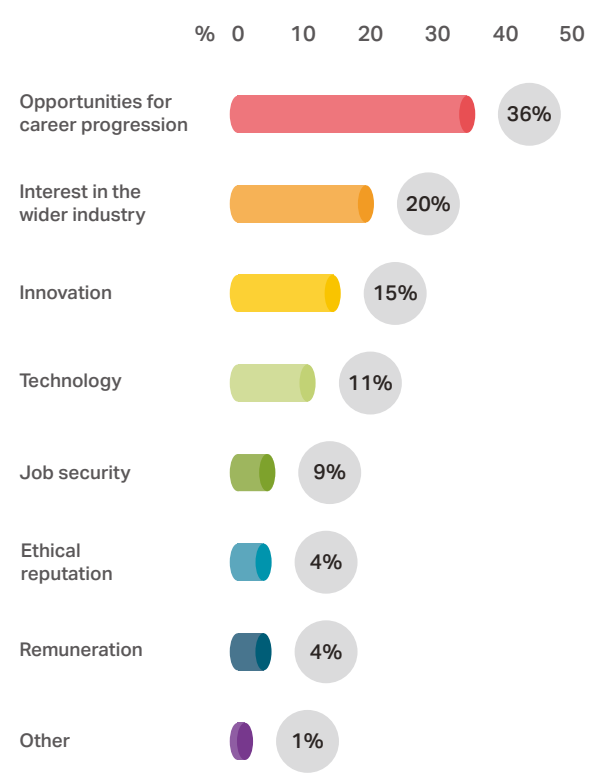
“Fewer oil and gas workers are willing to move sector than in any other, perhaps because of their high salaries and benefits,” says Peet. “However, our results show that this shouldn’t be mistaken for unshakeable loyalty – the clear message here is that companies need to be aggressive on career progression opportunities to keep their brightest and best.”

73%
of oil and gas professionals would consider switching to another sector entirely – a majority, but lower than any other energy sector.

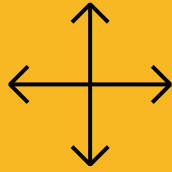
Where would this mobile-minded talent go? Renewables and petrochemicals remain the most popular destinations at 43 per cent and 32 per cent respectively. This makes sense to Peet: “The renewables sector continues to do a fantastic job at marketing itself to talent, while petrochemicals is a natural home for former-oil and gas professionals, with similar skillsets and a great deal of opportunity.”

“Fewer oil and gas workers are willing to move sector than in any other. However, this shouldn’t be mistaken for unshakeable loyalty – companies need to be aggressive on career progression opportunities to keep their brightest and best.”
– Hannah Peet

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



54%
of younger professionals think their organisation is loyal to its employees, against 41 per cent of their older peers.



Summary Oil and Gas

The downturn has had a long tail and salary growth has been slow to recover in the oil and gas sector – perhaps slower than some expected last year. Yet, it would be a mistake to characterise this as a sector in distress. Quite the opposite: the oil price seems to have settled somewhat and successful readjustment to this new environment means professionals and hiring managers alike are looking ahead with optimism and confidence.

However, money isn't everything and professionals are telling us loud and clear that career progression is crucial to them. Companies should see that enough opportunities are available and advertised to avoid their best talent looking elsewhere.





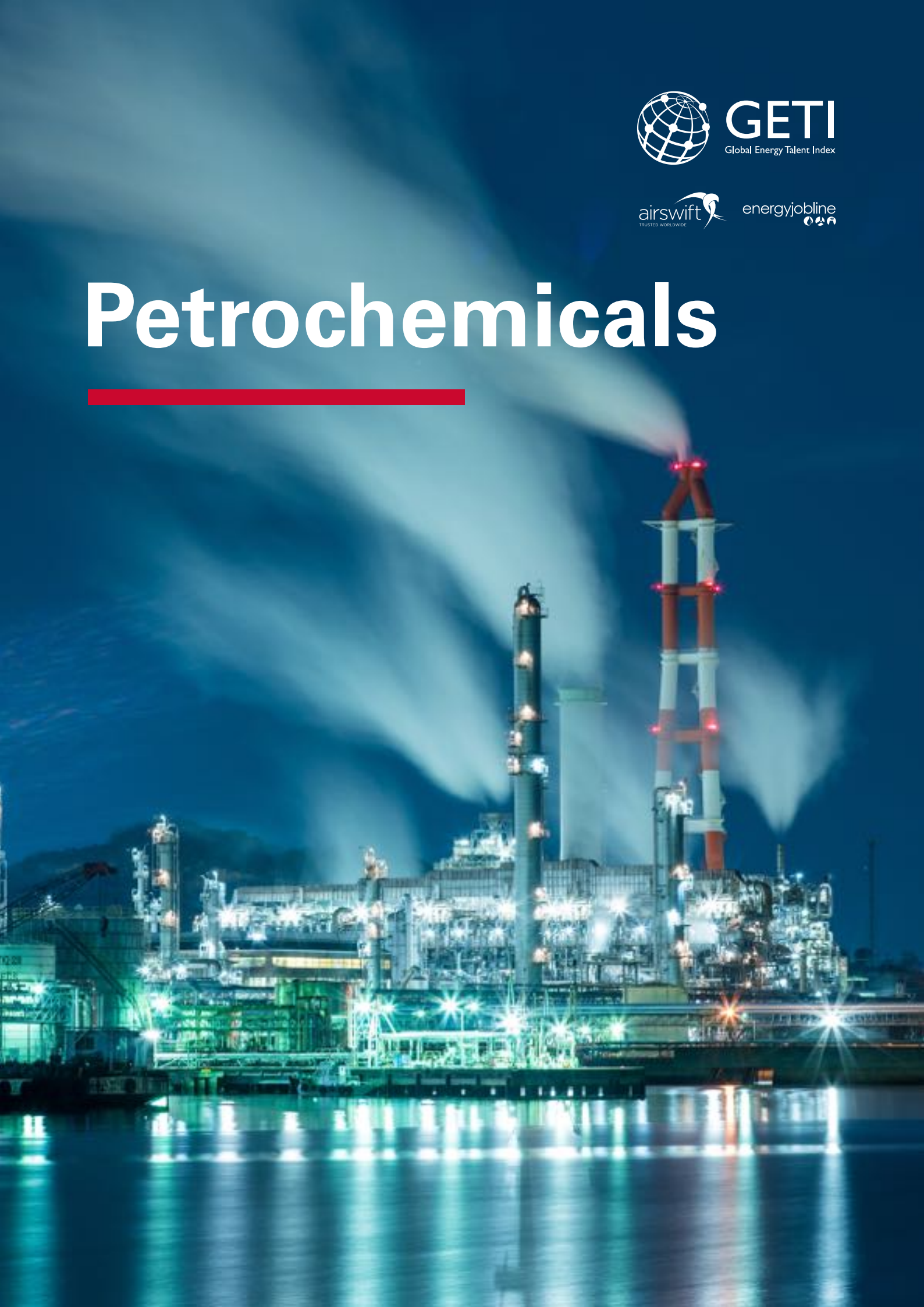


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Global Energy Talent Index

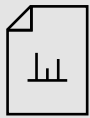


energyjobline

Petrochemicals



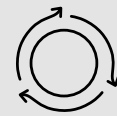
Contents: Petrochemicals



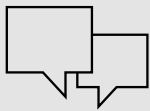
Demographics **27**



Salaries **28**



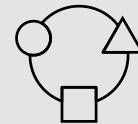
Global mobility **31**



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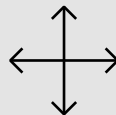
Skills and
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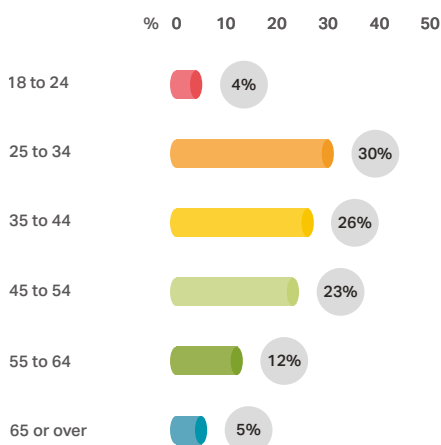


Petrochemicals

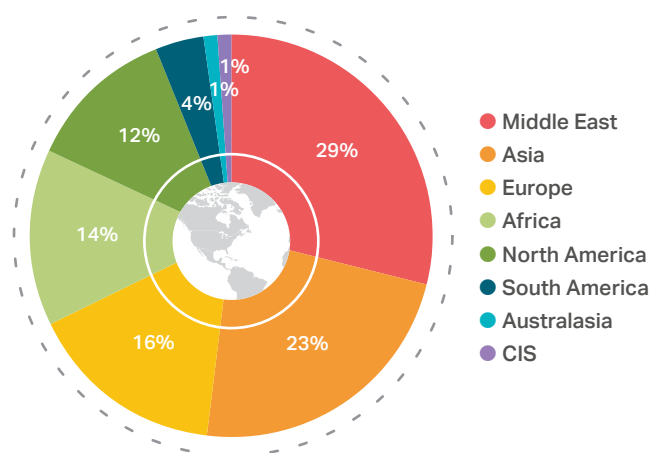
The petrochemicals sector is reaping the benefits of current global economic growth: salaries are high and rising, the workforce is engaged and the sector is in a good place. However, petrochemicals professionals always keep one eye on progression, and in this respect there are areas for improvement if the sector wishes to consolidate its comfortable position.

1. DEMOGRAPHICS

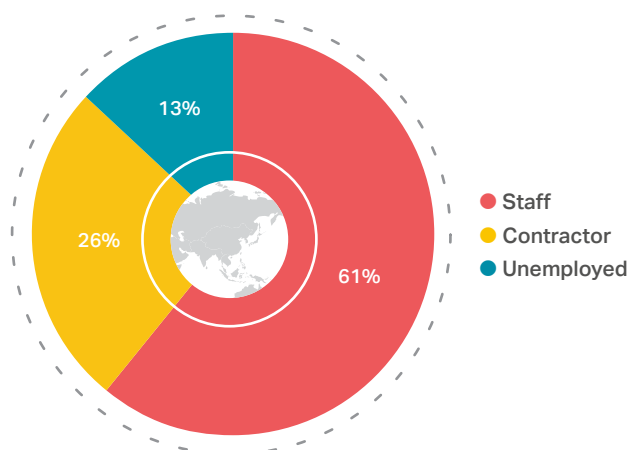
AGE



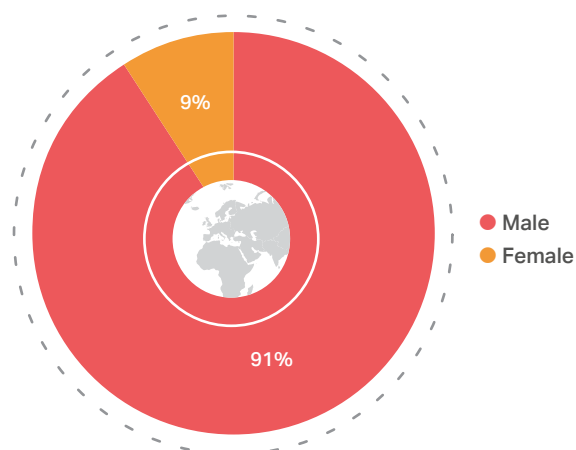
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

OPTIMISM ABOUNDS

Petrochemicals is a buoyant sector. More than half (55 per cent) of respondents report a pay rise in the

last year and as many as a quarter cashed in on a raise of more than five per cent.

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

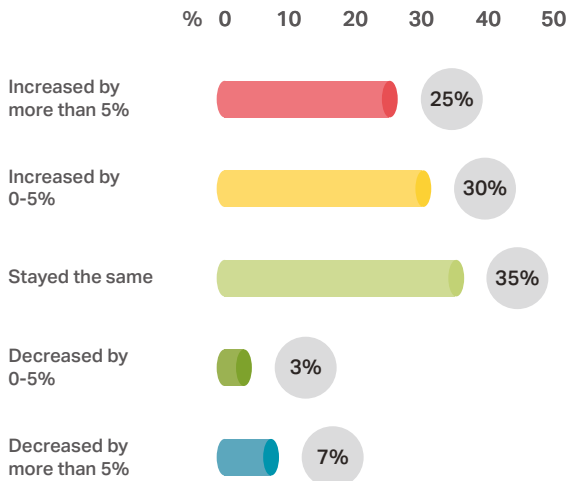
	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	42,976	55,754	72,718	29,412	59,136	35,478	58,545	92,429
Administrator	23,420	36,130	40,888	8,302	34,836	19,553	16,512	38,004
Chemical Engineer	49,852	53,255	58,379	30,231	66,003	32,392	65,789	102,314
Chemist	27,558	65,810	58,319	26,134	58,259	26,926	67,211	92,252
Construction Manager	88,425	62,708	80,719	25,983	82,305	37,737	87,423	107,513
Electrical Engineer	48,250	62,495	69,916	34,505	68,172	36,971	80,685	105,531
Environmental Manager	28,725	52,022	66,056	20,841	36,972	23,050	50,412	95,697
Finance Manager	56,057	718,34	83,862	24,995	82,392	44,210	77,409	117,033
Health and Safety Manager	41,934	50,384	75,878	27,150	52,559	30,555	55,741	94,518
HR Manager	48,047	70,966	50,636	24,052	73,392	36,515	68,687	86,894
Lab Manager	30,973	51,492	87,923	21,117	58,539	39,193	58,250	81,779
Maintenance Technician	18,012	41,243	68,048	31,857	46,097	23,703	39,046	82,420
Mechanical Engineer	62,945	67,181	92,703	37,439	66,155	40,115	68,874	124,379
Office Manager	29,307	42,045	49,514	29,728	36,311	38,432	35,789	65,884
Planner	19,378	48,017	72,296	29,346	43,706	23,236	55,471	70,789
Process Engineer	87,190	56,520	108,842	32,341	68,127	35,798	69,706	129,853
Process Operations Production Manager	49,723	60,248	90,296	21,359	64,320	36,546	62,743	77,231
Project Coordinator	22,355	39,639	69,857	32,838	63,107	23,682	37,292	72,450
Purchasing Manager	46,376	66,875	85,930	22,282	65,129	35,616	61,275	89,037
QA/QC Manager	49,065	70,751	78,053	52,896	72,493	73,193	65,832	119,571
Technical Engineer	31,931	45,470	66,239	54,847	43,850	52,137	46,755	95,430



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

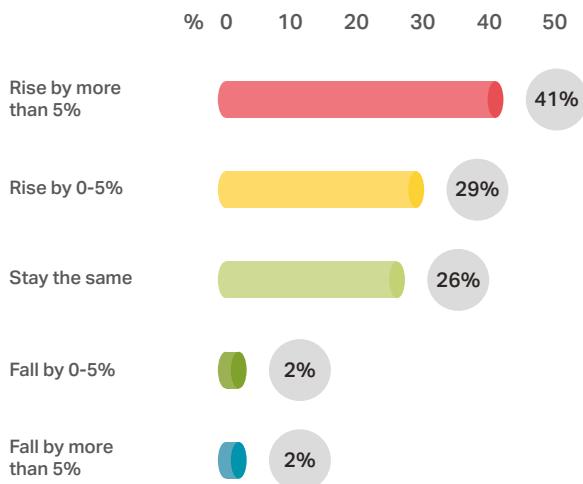
	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	328	381	442	208	467	249	423	658
Administrator	78	120	136	60	231	139	98	227
Chemical Engineer	392	414	421	216	510	231	470	810
Chemist	216	417	359	186	410	192	430	583
Construction Manager	572	448	553	185	680	270	621	763
Electrical Engineer	350	389	450	246	524	265	489	750
Environmental Manager	306	375	437	148	423	165	409	667
Finance Manager	393	491	469	178	576	316	553	785
Health and Safety Manager	372	372	509	194	532	219	491	659
HR Manager	297	482	317	171	513	261	449	568
Lab Manager	252	329	397	151	417	279	372	535
Maintenance Technician	235	255	274	195	415	146	265	357
Mechanical Engineer	415	405	611	268	476	286	471	854
Office Manager	203	295	311	203	255	274	257	430
Planner	200	338	436	209	317	166	423	505
Process Engineer	373	389	720	231	601	255	452	1,000
Process Operations Production Manager	360	426	561	153	460	261	516	1,000
Project Coordinator	329	432	477	265	439	169	295	508
Purchasing Manager	345	469	545	159	463	254	504	592
QA/QC Manager	404	472	468	388	612	522	450	950
Technical Engineer	459	295	391	345	480	306	445	615

PAY CHANGES AMONG WORKERS IN THE LAST 12 MONTHS (non-hiring professionals)



These good times are (seemingly) here to stay: 70 per cent of professionals expect a raise next year and a staggering 41 per cent expect it to be by more than five per cent. What’s more, their optimism seems well-grounded, with hiring managers – who typically have greater insight into pay grades – also returning results of 70 and 39 per cent.

PAY EXPECTATIONS AMONG WORKERS IN THE NEXT 12 MONTHS (non-hiring professionals)



70%

of hiring managers expect salaries to rise next year – 39 per cent by more than five per cent.

Janette Marx, CEO of Airswift, believes this optimism to be well-placed: “There is this perfect storm for petrochemicals wages: an ongoing talent squeeze, plus a resurgent oil and gas sector, plus general global economic growth – ideal for upward pressure on wages.”

Hannah Peet, MD of Energy Jobline, adds, “Petrochemicals ties into other sectors beyond energy, which gives it a stable foundation. As you see continued economic development in parts of the world like Asia and Africa, you see the build out of petrochemicals capacity, contributing to growth.”

“There is this perfect storm for petrochemicals wages: an ongoing talent squeeze, plus a resurgent oil and gas sector, plus general global economic growth – ideal for upward pressure on wages.”

– Janette Marx



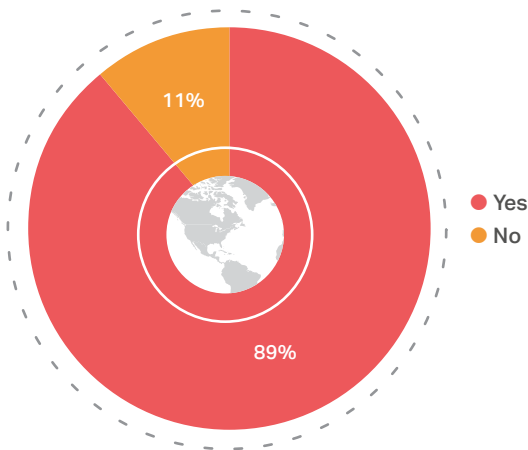
3. GLOBAL MOBILITY

NEW LANDS OF OPPORTUNITY?

The large majority – 89 per cent – of petrochemicals professionals are open to a career move abroad. When asked why, most point to career progression (44 per cent), though lifestyle and low cost of living (12 per cent), and culture (12 per cent) also feature in their thinking.

The most popular destination is Europe (24 per cent), closely followed by the Middle East (21 per cent) and Asia (19 per cent).

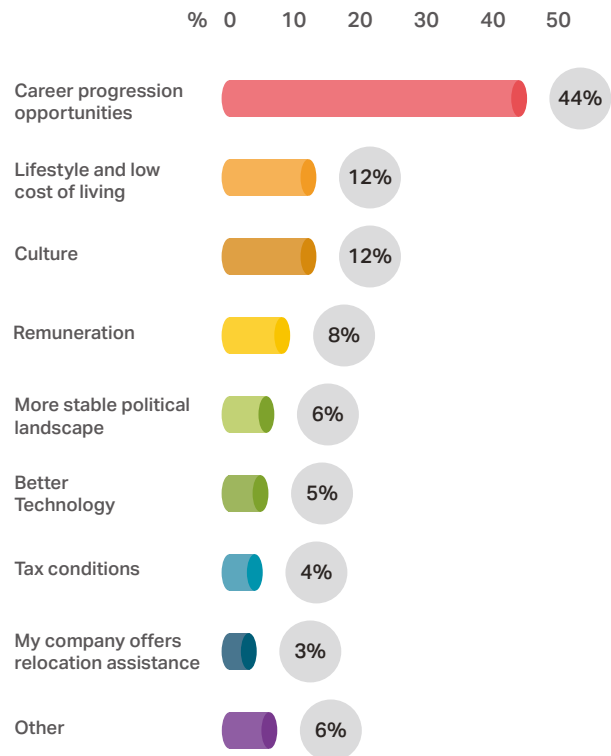
WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



Peet comments: “Europe has always had a strong petrochemicals sector, as has the Middle East, and Asia is rapidly expanding capacity as powerhouse economies in the region grow and their societies become hungrier for petrochemicals products.”

For Marx, however, there is a surprise: “North America is conspicuous by its absence. Maybe it’s because other regions are on the upswing of their growth, but America doesn’t seem to be the land of opportunity anymore for petrochemicals professionals.”

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



For the minority not wanting to move, family issues are the priority: 48 per cent cite proximity to family as a reason to stay put. Only eight per cent say it’s because opportunities aren’t there.

44%

of petrochemicals professionals open to relocating cite career progression as a reason.



4. AN ENGAGING CULTURE?

Professionals working in the petrochemicals sector are deeply engaged with their work. Ninety per cent of employees say they are engaged with their professional lives and 57 per cent go so far to say they are “very engaged”.

Marx can see why: “Materials like plastics and nylon are fundamental to the modern world. The public may not be aware of the sector’s influence on our everyday lives, but those inside certainly do and this creates a real sense of purpose.”

HOW ENGAGED ARE YOU WITH YOUR PROFESSIONAL LIFE?

● Very engaged ● Quite engaged ● Neither engaged nor disengaged ● Quite disengaged ● Very disengaged





However, men report slightly higher engagement than women (90 per cent versus 83 per cent), and are more likely to describe themselves as very engaged (58 per cent versus 50 per cent). Similarly, when employees are asked how much their organisation values them, 39 per cent of men feel very valued against 29 per cent of women.

“Materials like plastics and nylon are fundamental to the modern world. The public may not be aware of the sector’s influence on our everyday lives, but those inside certainly do and this creates a real sense of purpose.”

– Janette Marx

For both men and women, the most important factors in feeling engaged are a team that works well together, training, learning and development opportunities, and remuneration and benefits. However, there are differences.

Women put training, learning and development at the top of their list and a team that works well together second, while men inverse the order. Women are also more likely to value flexible working, diversity and inclusiveness, and remuneration and benefits. Men are more focused on the chance to work with cutting edge

tools and technologies, and a good team.

“Familiar stories emerge here,” says Peet. “The fact that women are emphasising development and pay suggest they are still pushing against a glass ceiling – men seem more comfortable with these factors. To see flexible working and diversity crop up also tells me that companies could be doing more to support women in the sector.”

Encouragingly, more respondents are satisfied with their organisation’s performance around the factors that keep them engaged. In particular, 71 per cent are satisfied that their teams work well together. However, only 43 per cent are happy with the career progression opportunities on offer, and 26 per cent are dissatisfied – a potential cause for concern.

“Familiar stories emerge here. The fact that women are emphasising development and pay suggest they are still pushing against a glass ceiling – men seem more comfortable with these factors. To see flexible working and diversity crop up also tells me that companies could be doing more to support women in the sector.”

– Hannah Peet

71%

are satisfied that their teams work well together. However, only 43 per cent are happy with the career progression opportunities on offer, and 26 per cent are dissatisfied – a potential cause for concern.



WHICH FACTORS MOST AFFECT YOUR PROFESSIONAL ENGAGEMENT?

● Female ● Male





5. SKILLS AND TRAINING

ROOM FOR IMPROVEMENT

Despite high engagement, a worrying 40 per cent of respondents report that their company does not regularly invest in their training and development. Twenty-eight per cent even claim not to have received any training whatsoever with their current employer this year.

However, only 35 per cent of women say they don't receive regular training, and only 22 per cent of young professionals do, versus 43 per cent of older peers.

Peet comments: "It is doubtful that companies are offering men and women different training packages in today's world. Perhaps women are more proactive in asking for training, as we see that this is more front of mind for women when it comes to engagement. As for younger professionals, it stands to reason they need more training as they learn the ropes."

"It is doubtful that companies are offering men and women different training packages in today's world. Perhaps women are more proactive in asking for training, as we see that this is more front of mind for women when it comes to engagement."

– Hannah Peet

Indeed, among those who do receive regular training, more than two thirds (67 per cent) say that training is to improve performance in their current role, while only 17 per cent say it is to invest in new skills not directly related to their role. Sixteen per cent say training is to develop their future career.

35%

of women say they don't receive regular training, along with only 22 per cent of younger professionals, versus 43 per cent of older peers.

"This may be short-sighted," says Marx. "People really care about career progression. So, the fact that very few receive future-orientated training should ring some faint alarm bells for employers."

The good news is that training seems to be delivered effectively. Of those that had received training, 47 per cent received instructor-led classroom-based training, 35 per cent benefited from leadership development programmes and 31 per cent participated in self-paced online learning. When asked how they prefer to receive training, we see the same top two answers at 51 per cent and 44 per cent respectively. Interestingly, 41 per cent favour practical hands-on activities, but only 20 per cent had access to such training in the past year.

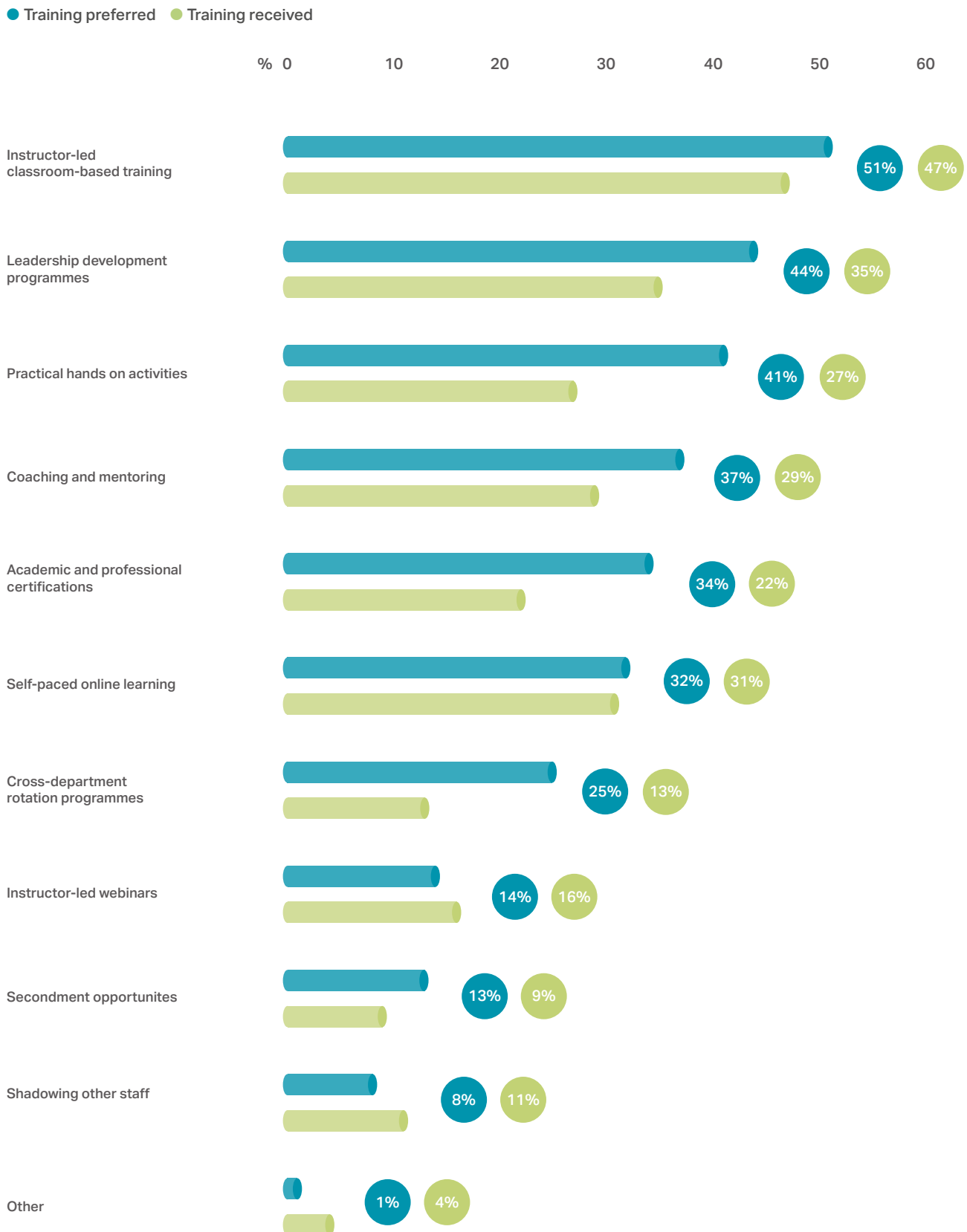
However, women are less likely to be placed on leadership development programmes – 21 per cent said they had received such training versus 26 per cent of men. For Marx, "this is another area that should be ringing those faint alarm bells."

"This may be short-sighted. People really care about career progression. So, the fact that very few receive future-orientated training should ring some faint alarm bells for employers."

– Janette Marx



TRAINING PREFERRED VS TRAINING RECEIVED





6. DIVERSITY

ALL ABOARD?

Just under three quarters (74 per cent) of employees in petrochemicals feel that their organisation values the

perspective of people with different backgrounds and beliefs equally. Eleven per cent disagree.

DOES YOUR ORGANISATION VALUE THE PERSPECTIVES OF PEOPLE WITH DIFFERENT BACKGROUNDS AND BELIEFS EQUALLY?

● Yes ● I don't know ● No





Is this good enough? Not for younger professionals. Only 61 per cent of them view their organisation's diversity performance positively, rising to 73 per cent for those in their prime and 81 per cent for older colleagues.

74%

of employees in petrochemicals feel that their organisation values the perspectives of people with different backgrounds and beliefs equally. Eleven per cent disagree.

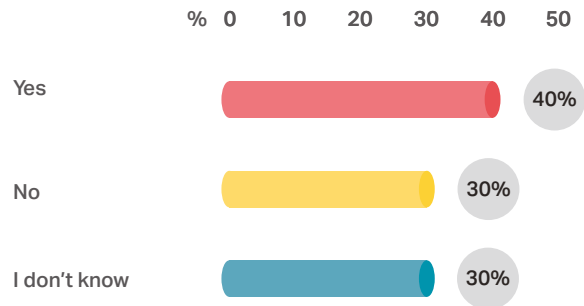
"Young people have grown up expecting more of the world when it comes to diversity and inclusion," says Marx. "It's no surprise they are less easily impressed by tentative efforts than older peers who may think 'at least it's better than it was'."

"Young people have grown up expecting more of the world when it comes to diversity and inclusion. It's no surprise they are less easily impressed by tentative efforts than older peers who may think 'at least it's better than it was'."

– Janette Marx

Hiring managers are slightly more positive than those without hiring responsibility, but not by a great deal (76 per cent versus 72 per cent). Just over half (52 per cent) of hiring managers say there are programmes or initiatives in place to improve diversity and inclusion – just 40 per cent of non-hiring professionals think the same.

DOES YOUR ORGANISATION OFFER ANY DIVERSITY PROGRAMMES? (non-hiring professionals)



Peet says: "You'd expect hiring managers to have a pretty good read on diversity, as they are directly involved in these initiatives. So, the fact these numbers are still low is concerning. I suspect there needs to be more programmes and more engagement with them from hiring managers who need to bring diversity and inclusion to the fore – especially when onboarding recruits."

"You'd expect hiring managers to have a pretty good read on diversity, as they are directly involved in these initiatives. So, the fact these numbers are still low is concerning."

– Hannah Peet

52%

of hiring managers say there are programmes or initiatives in place to improve diversity and inclusion.

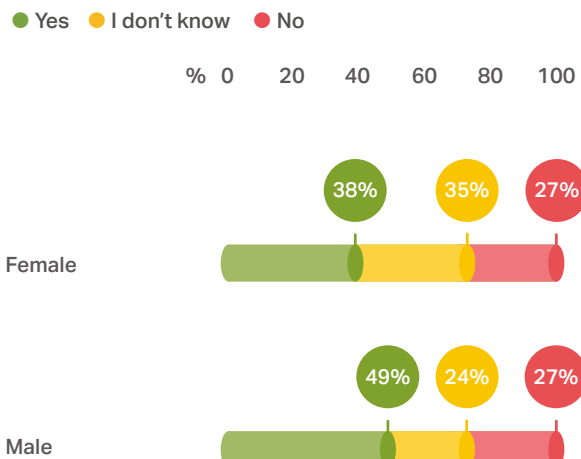


7. ATTRACTING AND RETAINING TALENT

LOYAL TO A POINT

The petrochemicals sector is a relatively loyal one. Forty-eight per cent of employees feel their organisation is loyal to them and 43 per cent expect to remain where they are for the next three years. Only 26 per cent expect to leave. Women perceive slightly less loyalty from employers, as do younger professionals (44 per cent versus 53 per cent of older peers).

IS YOUR ORGANISATION LOYAL TO ITS EMPLOYEES?

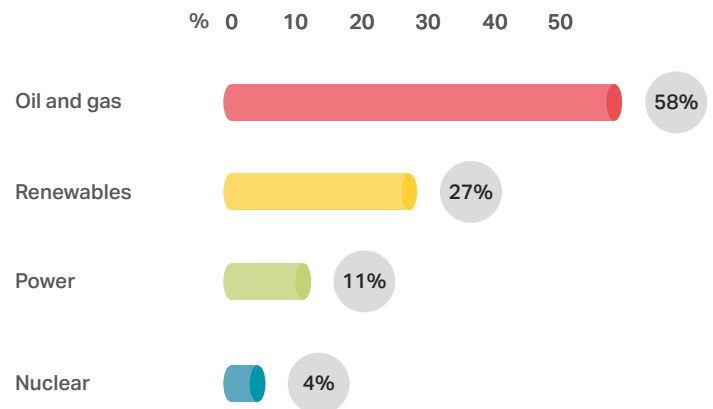


“Petrochemicals performs well here. Where the oil and gas sector took a knock to loyalty after the downturn, here it’s been more stable,” says Peet. “People are engaged, they are settled, and the jobs and salaries are good.”

However, loyalty can’t be stretched too far. Of those looking to stay put, 77 per cent could be convinced to leave if the right progression opportunity came up and 68 per cent would be tempted by a bump in pay. Of those looking to leave, 70 per cent and 61 per cent could be persuaded to stay for the same reasons, respectively. The workforce can’t be relied upon to stay static.

In fact, 82 per cent would consider switching to a new energy sector entirely in the next three years. Oil and gas – with a wealth of transferable skills – is the most popular destination (58 per cent), followed by renewables (27 per cent).

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



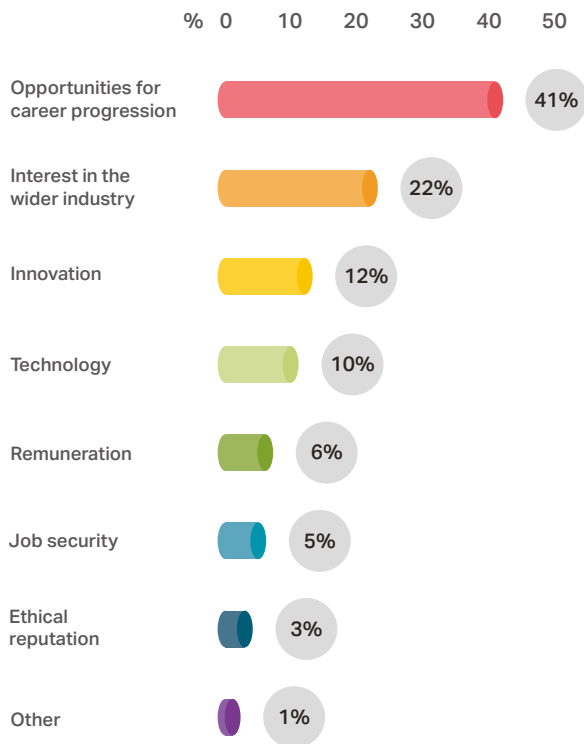
“There has always been an open door between petrochemicals and oil and gas,” says Marx. “The two sectors are symbiotic and very transferable. Renewables though – that’s a slightly different ballgame. Perhaps candidates spy opportunity in a new, growing sector.”

82%

of respondents would consider switching to a new sector entirely in the next three years.



WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



“Petrochemicals performs well here. Where the oil and gas sector took a knock to loyalty after the downturn, here it’s been more stable. People are engaged, they are settled, and the jobs and salaries are good.”

– Hannah Peet

41%

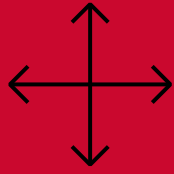
of professionals cited opportunities for career progression as the primary motivator for a change of sectors.

Indeed, opportunities for progression are the primary motivator for those considering a switch (41 per cent), followed by interest in the wider industry (22 per cent) and innovation (12 per cent). However, men are more likely to point to industry interest while women are more likely to chase opportunity.

“There has always been an open door between petrochemicals and oil and gas. Renewables though – that’s a slightly different ballgame. Perhaps candidates spy opportunity in a new, growing sector.”

– Janette Marx

“Once again we see women weighing opportunity slightly ahead of their male peers – perhaps a sign that they’re not getting all the chances they need to progress,” says Marx.



Summary Petrochemicals

The petrochemicals sector is one that has enjoyed a higher degree of stability in recent years than some other areas of energy, and that's reflected in healthy salary growth, booming optimism for the year ahead and sky-high engagement.

However, these good news stories are tempered by a lack of adequate training and career development opportunities, as well as room for improvement on diversity and gender equality. Petrochemicals professionals seem happy enough for now, but aren't shy about making a move in order to progress.







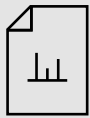
GETI
Global Energy Talent Index



Power



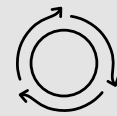
Contents: Power



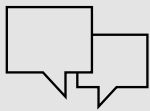
Demographics **45**



Salaries **46**



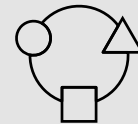
Global mobility **49**



An engaging
culture **50**



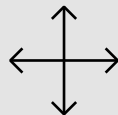
Skills and training **53**



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Summary **59**

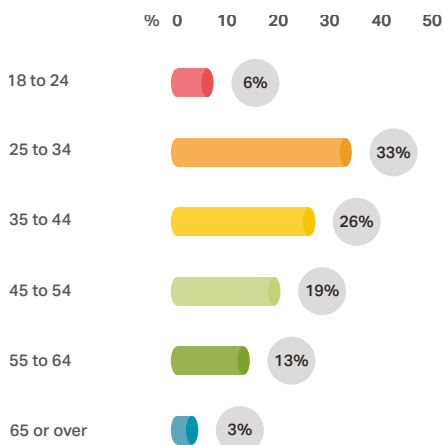


Power

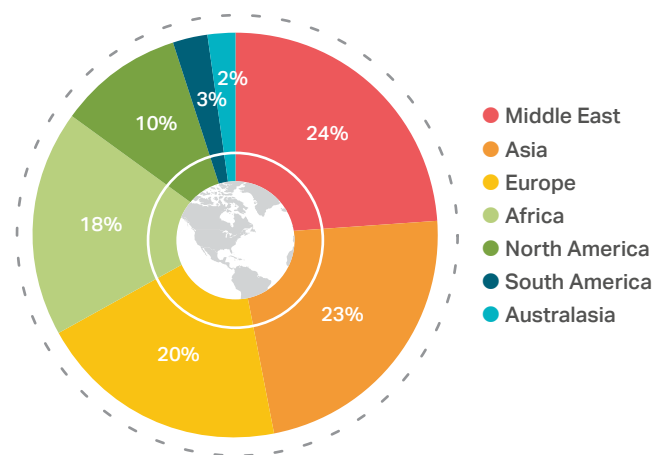
The power sector is readying itself for significant growth. The electrification of heat and transport in response to climate change coupled with socio-economic growth across the developing world, opens up exciting new opportunities. But with them come new challenges. To maintain its reputation for stability in this new environment, power firms must prioritise workforce engagement and retention, with team dynamics, salaries and career progression all having roles to play.

1. DEMOGRAPHICS

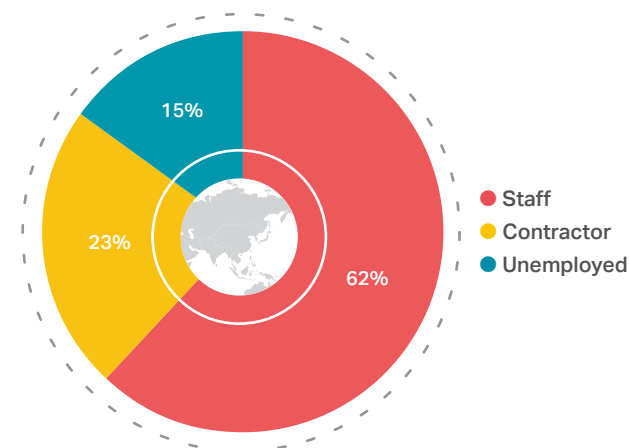
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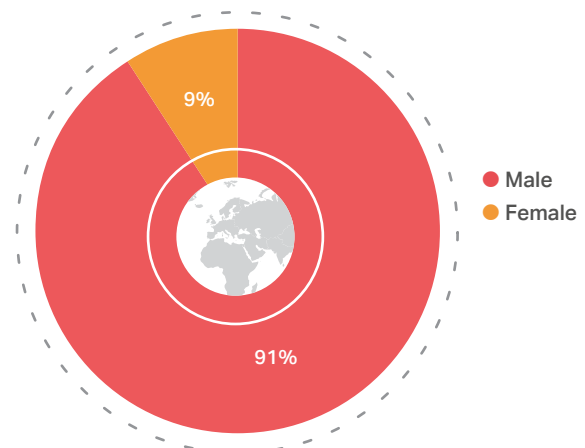
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

MODEST GROWTH, LOFTY AMBITIONS

Power professionals' pay continues to rise, though at a slower rate than last year with five per cent reporting their salaries having fallen by more than five per cent. Fewer than half (48 per cent) of respondents report an

increase: nine per cent down on last year and below the expectations of the 74 per cent who said they were expecting a raise during 2019. Twenty-two per cent enjoyed an increase of more than five per cent.

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

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	56,803	65,884	65,194	34,733	66,060	42,210	65,578	96,242
Business Development Manager	58,410	67,102	61,957	24,411	75,142	43,178	79,845	88,170
CAD Technician/ Operator	27,741	49,727	45,404	30,887	48,707	24,474	44,512	68,307
Chemical Engineer	49,852	59,023	57,000	30,060	55,774	32,208	67,581	94,671
Civil Engineer	67,231	61,136	71,351	27,398	61,891	31,001	65,235	100,810
Commercial Manager	61,330	72,912	71,312	54,450	73,858	89,764	60,431	89,127
Commissioning Engineer	52,346	81,211	76,744	29,368	79,223	30,472	60,174	120,557
Construction Manager	67,353	63,246	75,294	25,670	76,473	37,280	80,668	123,328
Control Room Operator	36,154	43,395	55,540	27,733	51,852	31,948	46,511	82,050
Design Engineer	53,470	57,136	61,680	58,879	56,294	60,210	57,890	92,770
Electrical Engineer	69,140	69,070	65,693	33,202	69,300	65,335	66,871	95,881
HSE Manager	57,939	67,457	86,514	47,958	70,504	29,214	70,415	97,538
Inspection Engineer	56,304	66,848	63,571	44,724	65,843	48,314	60,578	85,779
Instrumentation Engineer	57,325	85,187	65,935	31,068	67,139	32,068	65,741	110,684
Maintenance Engineer	47,130	66,813	57,632	41,362	55,887	35,456	63,142	87,563
Mechanical Engineer	60,870	66,766	62,740	37,059	63,884	39,708	68,874	114,800
Plant Manager	68,217	64,507	61,622	25,002	61,090	40,230	80,457	85,535
Project Engineer	62,300	69,550	54,801	29,370	75,279	34,638	59,377	88,523
Project Manager	66,403	70,292	69,206	28,153	70,730	45,862	79,874	129,128
QA/QC Inspector	67,353	66,690	73,947	50,671	81,522	62,898	65,780	88,521
Quantity Surveyor	49,201	69,613	65,932	17,244	60,815	29,931	67,612	81,101

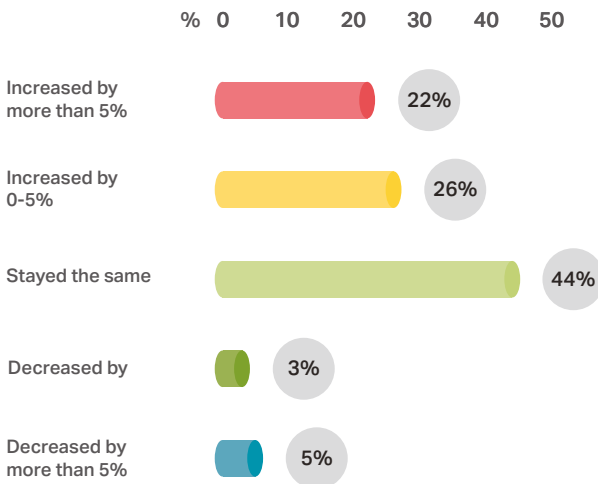


CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	429	471	480	248	499	296	474	653
Business Development Manager	382	480	504	175	596	308	751	576
CAD Technician/ Operator	182	347	300	216	347	174	358	455
Chemical Engineer	392	425	425	215	435	230	500	603
Civil Engineer	519	438	518	196	440	221	467	702
Commercial Manager	440	526	513	389	525	641	431	619
Commissioning Engineer	382	579	542	209	567	217	377	811
Construction Manager	485	458	534	183	649	266	623	853
Control Room Operator	266	313	411	198	391	228	325	563
Design Engineer	366	411	449	421	405	431	396	641
Electrical Engineer	545	431	482	237	525	467	518	679
HSE Manager	455	465	590	341	587	209	495	605
Inspection Engineer	454	477	470	317	515	243	478	530
Instrumentation Engineer	426	604	486	222	485	230	454	753
Maintenance Engineer	362	479	442	296	398	254	410	615
Mechanical Engineer	484	479	467	265	456	284	469	820
Plant Manager	502	467	449	178	443	288	500	585
Project Engineer	419	455	403	209	627	247	450	555
Project Manager	555	562	618	201	563	328	509	887
QA/QC Inspector	551	525	544	380	582	450	501	650
Quantity Surveyor	409	497	461	123	435	213	472	555

However, professionals remain optimistic, with 71 per cent expecting pay to increase in 2020. Indeed, nearly half (44 per cent) expect to see a raise of more than five per cent, the highest of any sector.

PAY CHANGES AMONG WORKERS IN THE LAST 12 MONTHS (non-hiring professionals)



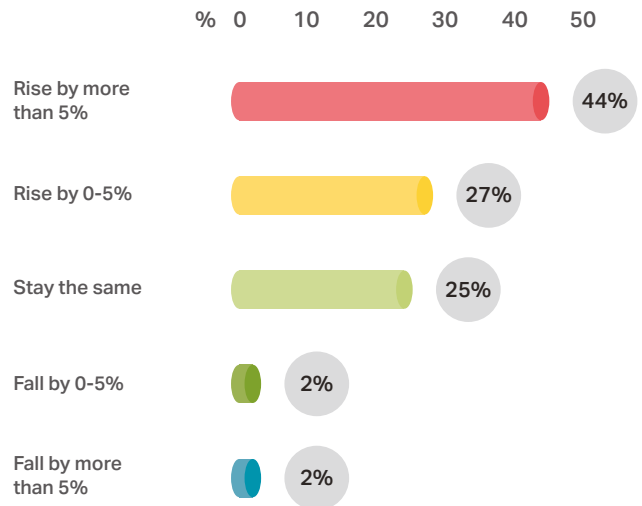
Hiring managers are equally optimistic; 71 per cent expect pay to rise in 2020 – 42 per cent by more than five per cent. Only six per cent expect pay to fall – a good omen for professionals.

“Power has long been a stable sector, and this is reflected in professionals’ pay. However, this period of stability is unlikely to last forever. Expect pay demands to creep upwards.”

– Hannah Peet

Hannah Peet, MD at Energy Jobline explains: “Power has long been a stable sector, and this is reflected in professionals’ pay. However, this period of stability is unlikely to last forever, particularly as the need to electrify to meet climate goals puts pressure on resources, along with increased electricity consumption in developing nations. Expect pay demands to creep upwards as this creates increased competition for talent.”

PAY EXPECTATIONS AMONG WORKERS IN THE NEXT 12 MONTHS (non-hiring professionals)



71%

of hiring managers expect pay to rise in 2020 – 42 per cent by more than five per cent.

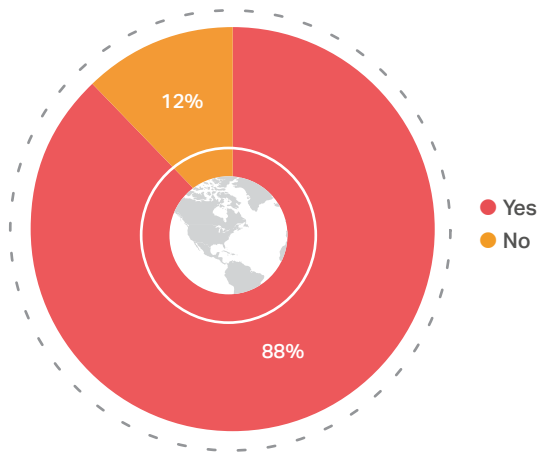


3. GLOBAL MOBILITY

CHASING OPPORTUNITY

As in 2019, nearly nine in ten (88 per cent) professionals said they would consider relocating to another region for work. While Europe and the Middle East remain respondents' first and second choices respectively, Asia entered GETI's top three to challenge North America for the first time.

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?

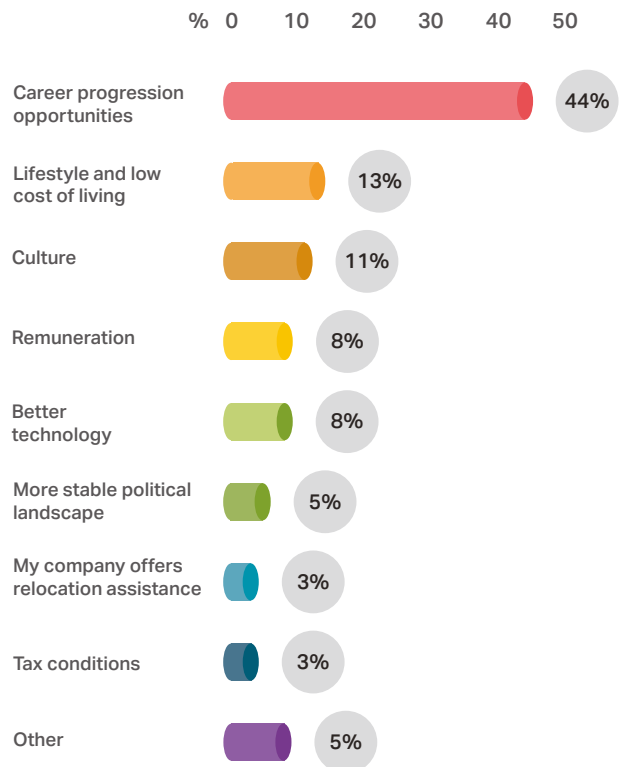


Peet says: "This is an exciting shift to see in just 12 months. The Asian market is thriving and in turn creating sought after opportunities for career progression. Salaries are also picking up, making the region a more attractive place to work."

Career progression remains the primary motivator (44 per cent) for relocation, followed by a better lifestyle and lower cost of living (13 per cent) and opportunities to experience a different culture (11 per cent).

Airswift CEO, Janette Marx adds: "Stricter immigration policies are making it more difficult for professionals to pursue career progression in the US. While the impact may not be immediate, if prospective professionals are forced to look elsewhere to achieve their ambitions, North American power innovation stands to take a hit."

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



"Stricter immigration policies are making it more difficult for professionals to pursue career progression in the US. While the impact may not be immediate, North American power innovation stands to take a hit."

– Janette Marx



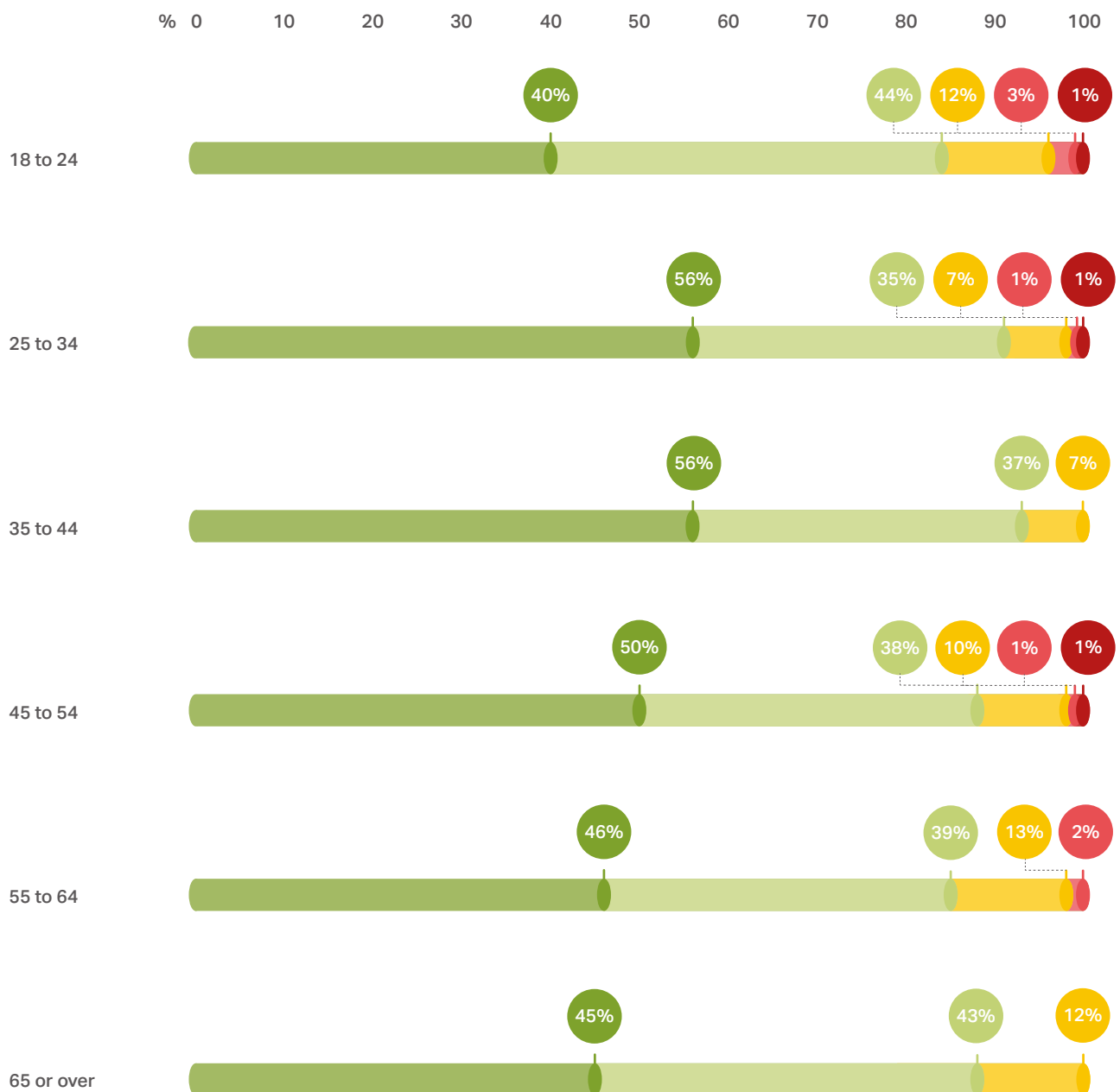
4. AN ENGAGING CULTURE?

The overwhelming majority (90 per cent) of professionals said they feel engaged with their professional lives, with 52 per cent describing

themselves as very engaged. Only one in every hundred feel disengaged from their career. Altogether, very good news for the sector.

HOW ENGAGED ARE YOU WITH YOUR PROFESSIONAL LIFE?

● Very engaged ● Quite engaged ● Neither engaged nor disengaged ● Quite disengaged ● Very disengaged





This is despite mixed feelings around the extent to which professionals are valued by their employers. Only 38 per cent of professionals feel their organisations value them a lot, while nearly half (45 per cent) feel valued but not as much as they think they should be. Just over one-in-ten do not feel valued at all.

Similarly to other sectors, when asked to pinpoint the cornerstones of professional engagement, the most popular factor is a team that works well together, cited by 53 per cent of both men and women. This is followed by training, learning and development opportunities (45 per cent) and the opportunity to work with cutting-edge tools and technologies (37 per cent).

Fortunately, nearly three-quarters of professionals are happy with their teams' cooperation. However, it should be noted that 29 per cent express dissatisfaction with the career progression opportunities on offer.

As Marx notes: "Most people are satisfied with their employers' efforts to engage them on key issues. However, with personal development high on everyone's wish list, there's a line to be drawn between career progression and talent retention. The fact that so many are dissatisfied with the progression opportunities in front of them is concerning."

"Most people are satisfied with their employers' efforts to engage them on key issues. However, the fact that so many are dissatisfied with the progression opportunities in front of them is concerning."

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"The energy transition will see more pressure put on businesses and it's in these periods of stretch that an efficient, effective and engaged workplace can make all the difference."

– Hannah Peet

Hiring managers should also note differences in the engagement of men and women. Ten per cent more men favour opportunities to work abroad, and eight per cent more consider remuneration and benefits as a priority. On the other hand, more women than men value flexible working opportunities.

But perhaps the most important difference is in overall engagement levels. While 53 per cent of men describe themselves as very engaged with their professional lives, that figure falls slightly to 46 per cent of women.

Should something be done about the difference? Peet offers: "The energy transition will see more pressure put on businesses and it's in these periods of stretch that an efficient, effective and engaged workplace can make all the difference."

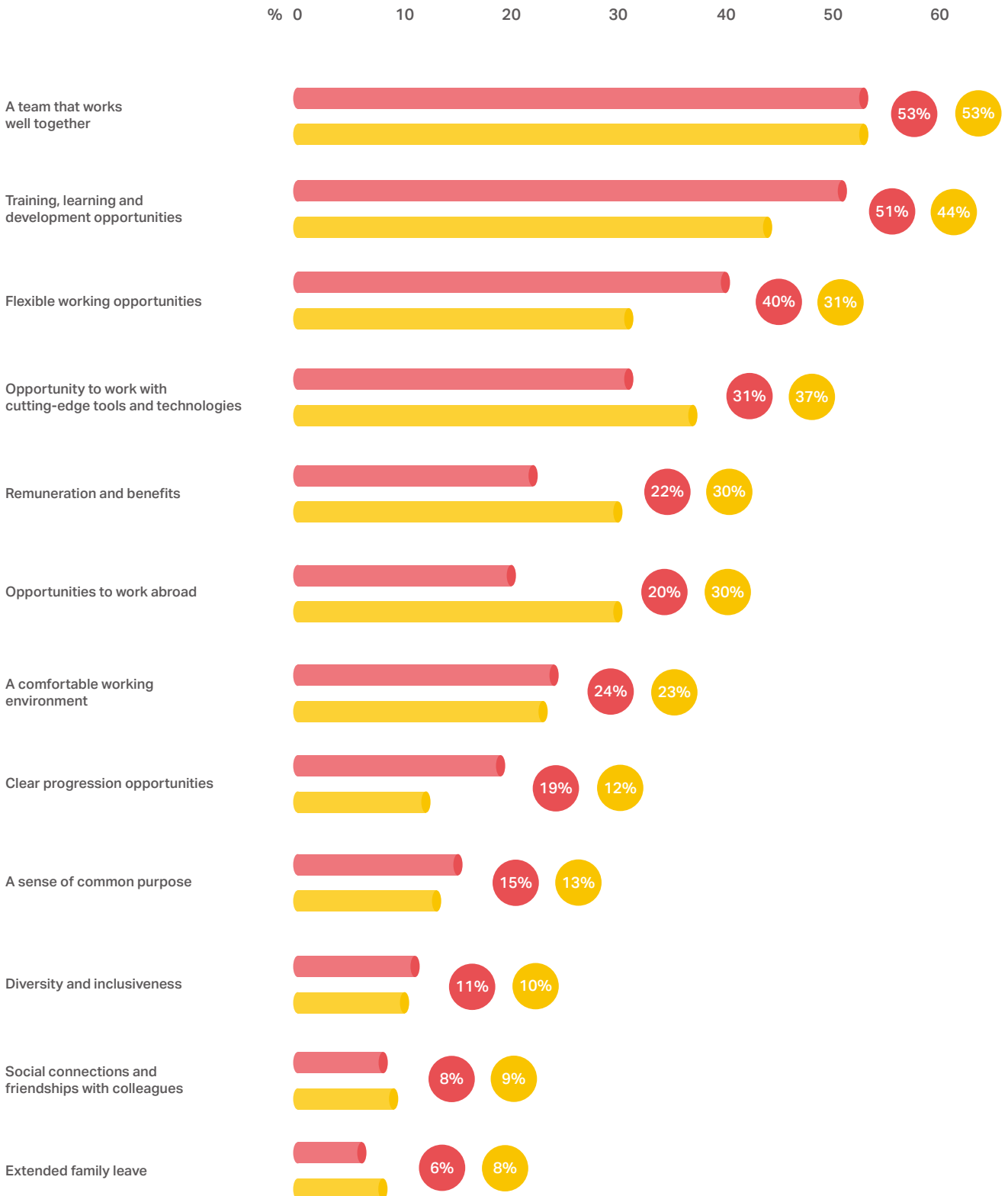
90%

of power professionals feel engaged by their professional lives.



WHICH FACTORS MOST AFFECT YOUR PROFESSIONAL ENGAGEMENT?

● Female ● Male





5. SKILLS AND TRAINING

A CASE FOR INVESTMENT

Professionals are invested in their workplaces, but do their workplaces invest in them? Overall, 44 per cent of respondents said that their company does not regularly invest in their training and development, with a third (30 per cent) reporting that they had not accessed training with their current employer this year.

However, Marx questions whether we're seeing the full picture: "Professionals can discount informal training from their minds regardless of its value. If that is the case, should the industry better formalise what it offers?"

Women are more likely than men to believe their employer regularly invests in their development (63 per cent versus 55 per cent). However, this may not play out. Men and women are equally likely to have received training in the past year, and women are slightly less likely to be placed on leadership development programmes (18 per cent versus 22 per cent).

"Despite the spread of digital technology into all aspects of our lives, many professionals prefer to learn through interacting with others, whether it be in a classroom or out on-site."

– Hannah Peet

For those that have received training, two thirds say it was to improve performance in their current role, while 20 per cent say it was either to broaden their skillset beyond their day-to-day role and 15 per cent point to preparation for their future career.

44%

of respondents say that their company does not regularly invest in their training and development.

Are companies being too short-termist? Marx cites: "If there is anything to learn from wider energy sectors, it is that companies need to invest in the leadership qualities of junior members of staff if they want to avoid a middle management skills gap later."

When it comes to how professionals would like to receive training, instructor-led, classroom-based training leads the pack (51 per cent). Leadership development programmes come second on 44 per cent, closely followed by practical, hands-on activities (42 per cent).

Reflecting those preferences, a third (30 per cent) of all respondents received classroom-based training, and 22 per cent were placed on leadership development programmes. Nearly a quarter of professionals also said that they had been enrolled in online courses to enhance their skills.

51%

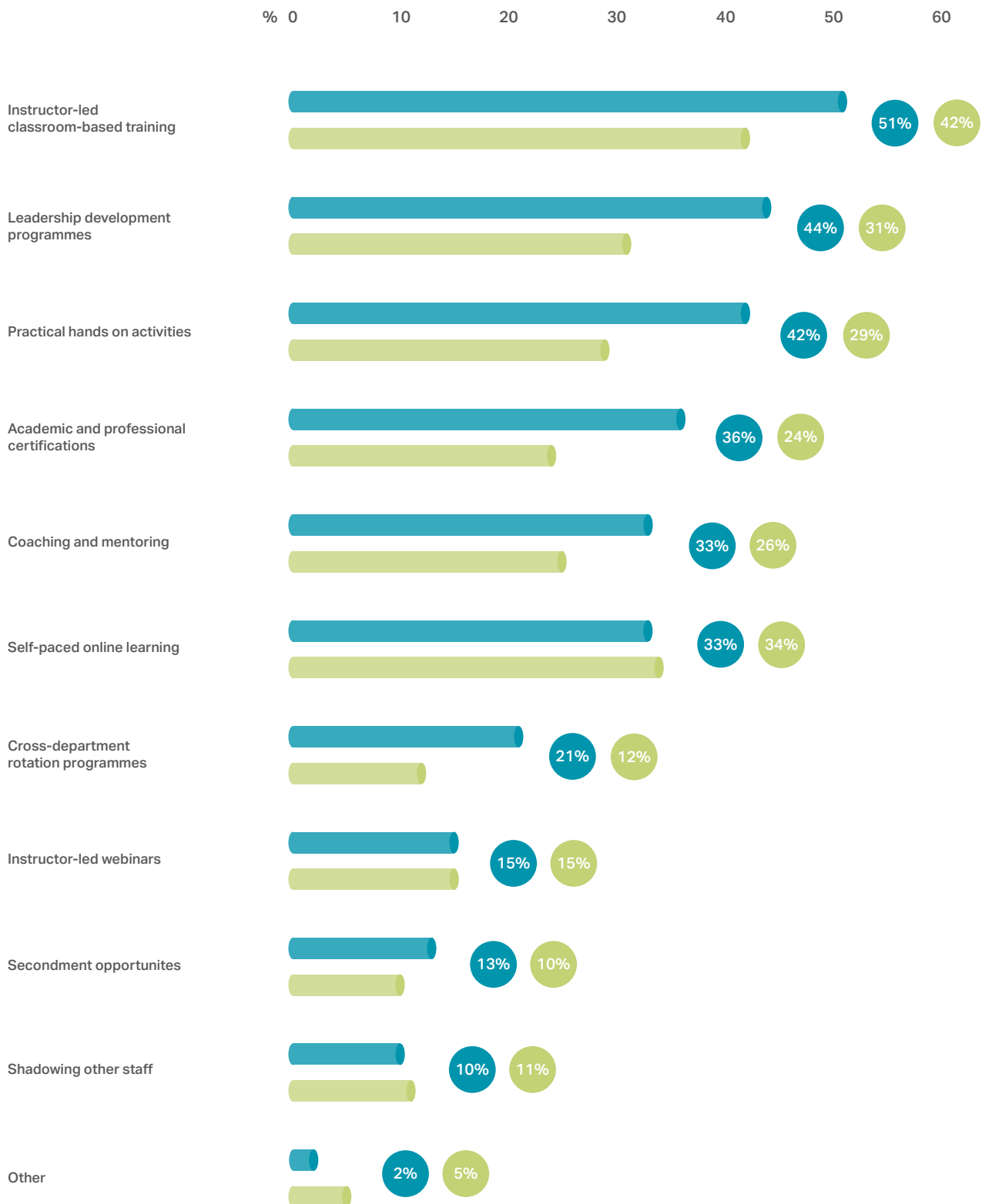
of respondents express a preference for instructor-led, classroom-based training – more than any other method.

Peet says: "Despite the spread of digital technology into all aspects of our lives, many professionals prefer to learn through interacting with others, whether it be in a classroom or out on-site. Online learning was ranked sixth, despite it being the second most offered option."



TRAINING PREFERRED VS TRAINING RECEIVED

● Training preferred ● Training received





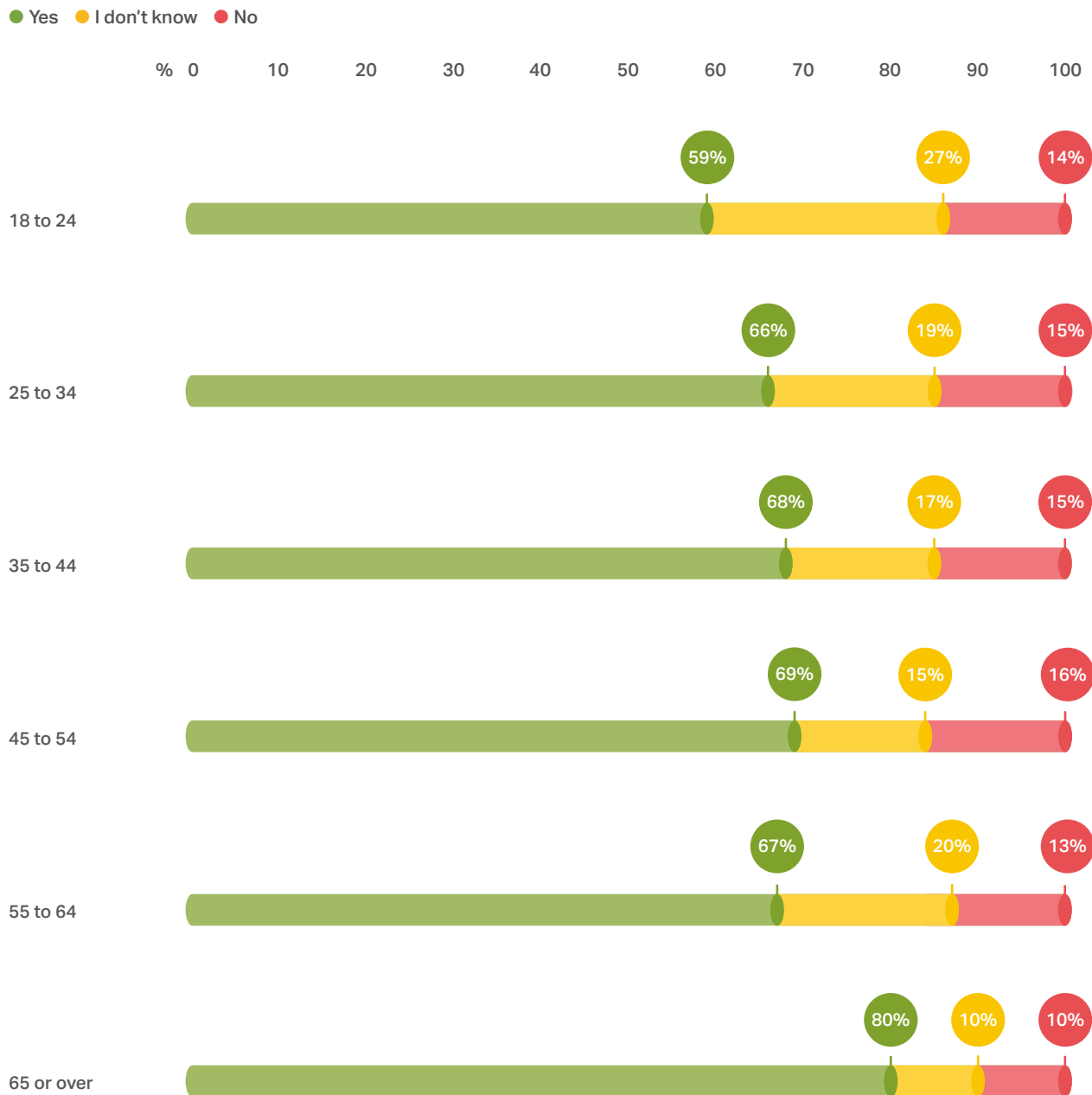
6. DIVERSITY

SIGNS OF PROGRESS?

Two-thirds of professionals say their organisation values the perspectives of people with different backgrounds and beliefs equally. Positive overall, although more respondents disagreed than in other sectors.

Like elsewhere in the industry, younger employees tend to feel less positive about their organisation's progress on diversity (59 per cent) with positivity increasing significantly by age (70 per cent for over 55s).

DOES YOUR ORGANISATION VALUE THE PERSPECTIVES OF PEOPLE WITH DIFFERENT BACKGROUNDS AND BELIEFS EQUALLY?

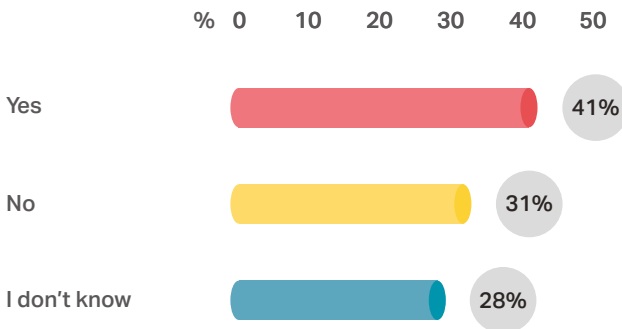




Marx explains: “In the age of Greta Thunberg, younger generations are learning to make their voices heard. They have grown up in an environment that is altogether more inclusive, more global and with more knowledge at their fingertips. This means they can hold employers to a higher standard and move quickly on new issues – what was progressive two years ago is unlikely to impress for long.”

Fewer than half (40 per cent) of non-hiring professionals report that their companies have programmes or initiatives in place to improve diversity and inclusion, a statistic that only slightly improves when hiring managers are asked (50 per cent say that there are such initiatives).

DOES YOUR ORGANISATION OFFER ANY DIVERSITY PROGRAMMES? (non-hiring professionals)



Peet says: “Employees’ knowledge of diversity and inclusion activities reflects how well they are communicated. Yet only half of hiring managers said that actions were in place. This suggests that there is still work to be done before all businesses have the right processes to foster a level playing field.”

“In the age of Greta Thunberg, younger generations are learning to make their voices heard. They have grown up in an environment that is altogether more inclusive, more global and with more knowledge at their fingertips. This means they can hold employers to a higher standard and move quickly on new issues – what was progressive two years ago is unlikely to impress for long.”

– Janette Marx

50%

of hiring managers report having any diversity or inclusion programmes in place.

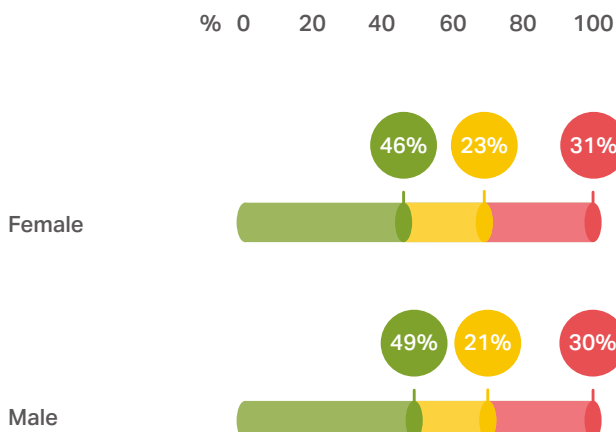


7. ATTRACTING AND RETAINING TALENT

The power workforce has mixed feelings about whether it is valued – is the story for loyalty the same? The results suggest so: half of professionals (48 per cent) believe their organisation is loyal to its employees, but a third disagree (30 per cent). While this may seem worrying, 41 per cent foresee remaining with their employer for the next three years, compared to only 29 per cent who expect to leave.

IS YOUR ORGANISATION LOYAL TO ITS EMPLOYEES?

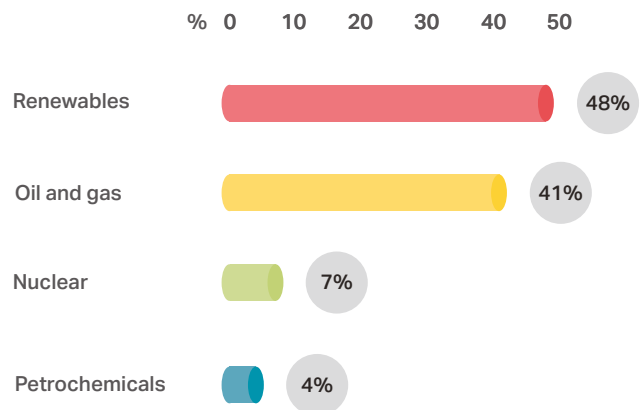
● Yes ● I don't know ● No



As with other sectors, motivations to leave are underpinned by salary and career progression – for those looking to leave, 64 per cent could be swayed if given a new challenge or opportunity to progress and 62 per cent would stay if offered more money.

But even for those not considering a move, most could be convinced if granted progression opportunities (80 per cent) or an increase in salary (60 per cent).

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



Marx says: “Salary and career progression are big motivators, and companies need to invest in both. Yet maintaining loyalty, particularly with older employees, may be just as important for ensuring all that experience doesn’t walk out the door.”

Peet adds: “Employees want to feel valued, and companies need to be authentic to achieve that – as they say, loyalty is earned not bought.”

“Salary and career progression are big motivators, and companies need to invest in both. Yet maintaining loyalty, particularly with older employees, may be just as important for ensuring all that experience doesn’t walk out the door.”

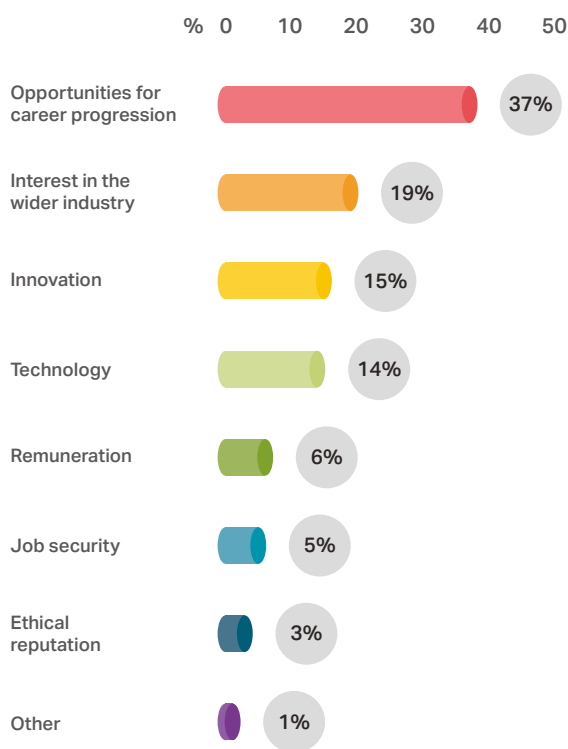
– Janette Marx



“Employees want to feel valued, and companies need to be authentic to achieve that – as they say, loyalty is earned not bought.”

– Hannah Peet

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



Looking to the future, a large majority (84 per cent) of professionals said they would consider working in another sector in the next three years, a third drawn by progression opportunities. A role in renewables (48 per cent) or oil and gas (41 per cent) remain the most popular options.

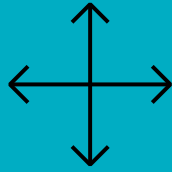
41%

expect to remain with their employer for the next three years, compared to only 29 per cent who expect to leave.

Is this an early sign of unrest? Marx suggests not: “By today’s standard a professional will have worked in several sectors before they retire. Consequently, we see a large proportion of professionals express an interest in moving around year-on-year – so this by itself is not a worry. That said, current sentiment points to career progression as being the one thing professionals need companies to get right.”

“That we see a large proportion of professionals express an interest in moving around year-on-year is not in itself a worry. However, current sentiment points to career progression as being the one thing professionals need companies to get right.”

– Janette Marx



Summary Power

The power sector has built a reputation for being fairly stable, but salary growth has slowed against a backdrop of dissatisfaction on career progression opportunities. Is it in danger of falling into a complacency trap of its own making? With challenges and opportunities ahead, now is not the time for companies to be lulled into a false sense of security. Renewed focus on the basics – career progression,

training and remuneration – as well as making greater strides on diversity and inclusion will create a bedrock for success. Inaction on these key issues may ultimately impact the ability of the sector to retain key talent as it tackles the challenge of decarbonisation.







GETI
Global Energy Talent Index

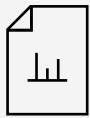


energyjobline

Renewables



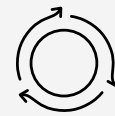
Contents: Renewables



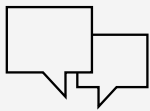
Demographics **63**



Salaries **64**



Global mobility **67**



An engaging culture **68**



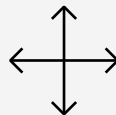
Skills and training **71**



Diversity **73**



Attracting and retaining talent **75**



Summary **77**

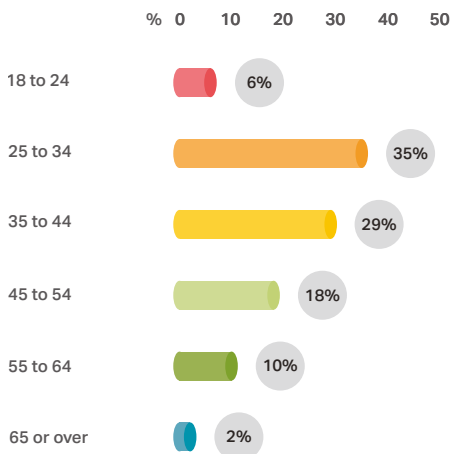


Renewables

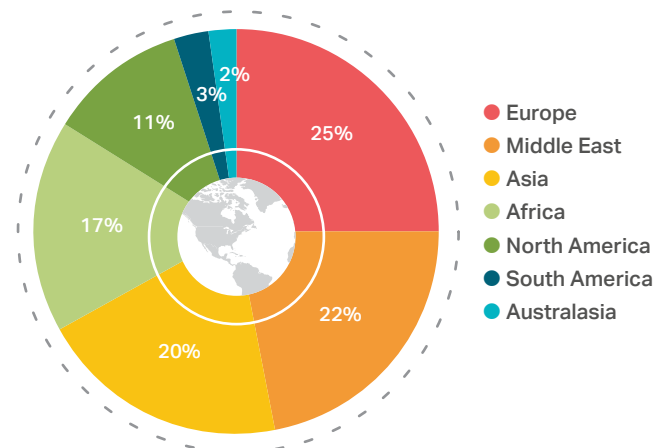
The renewables sector is an optimistic one, but how does it fair against its older siblings? In short, rather well. Engagement and loyalty are high among professionals, and while a career in the sector may not be as lucrative as elsewhere, salaries continue to rise. It's a firm foundation upon which the sector can build over the course of the next decade, as countries strive to meet carbon targets.

1. DEMOGRAPHICS

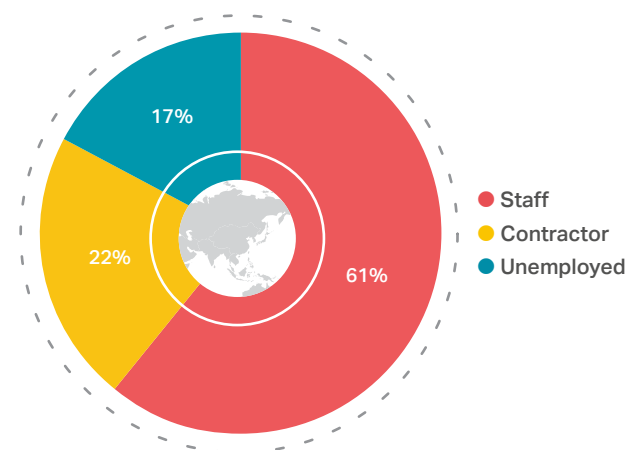
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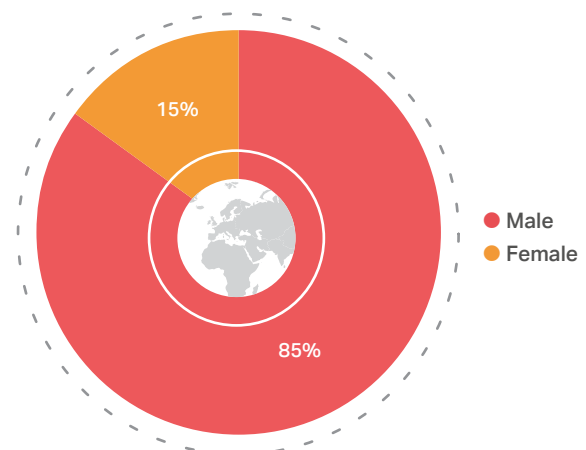
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

STRONG BUT STEADY

Pay increases were not as abundant as last year; just short of half (48 per cent) of professionals report a rise, while an unlucky eight per cent report a fall.

More positively, 23 per cent boast an increase of five per cent or more. While hiring managers' views are broadly attuned to professionals', for many, last year's optimism was not borne out.

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

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	48,762	56,571	95,836	33,653	57,861	38,854	56,878	87,223
Biomass Engineer	38,200	44,392	81,967	27,739	46,595	31,389	39,785	67,615
Business Development Manager	52,880	70,736	88,797	25,992	63,349	42,216	53,211	87,221
Civil/Structural Engineer	47,497	52,333	95,890	45,555	61,000	61,803	52,286	84,737
Commercial Manager	53,980	64,492	122,950	50,813	71,427	68,973	53,901	76,427
Construction Manager	66,205	73,978	116,120	25,428	81,691	45,448	79,510	117,298
Design Engineer	50,090	54,800	88,797	57,192	56,837	61,279	59,746	82,954
Electrical Engineer	47,809	54,045	95,890	32,781	50,062	35,124	49,640	89,100
Energy Engineer	38,265	58,393	85,382	30,087	51,414	31,220	45,709	58,272
HSE Manager	61,210	70,874	105,874	20,700	65,281	26,777	78,375	119,628
Maintenance Engineer	56,350	60,476	88,980	43,444	54,641	25,179	54,407	94,406
Marine Engineer	43,751	51,673	88,980	29,749	49,579	30,868	57,838	76,030
Mechanical Engineer	52,128	61,515	92,560	35,176	48,913	37,691	53,248	106,540
Operations Manager	46,016	46,508	102,669	21,546	55,156	49,537	44,582	71,449
Project Engineer	41,313	49,103	95,890	27,693	48,874	32,661	52,959	81,934
Project Manager	54,360	64,083	112,936	48,243	70,340	42,607	68,523	106,040
QA/QC Manager	44,807	56,128	95,824	16,704	55,779	29,957	64,145	108,400
Renewable Energy Consultant	39,140	43,685	88,980	22,607	45,264	36,134	47,993	69,107
Solar Engineer	45,425	49,661	76,591	27,929	72,965	34,059	55,443	91,007
Wind Farm Project Manager	53,663	61,228	112,936	47,140	59,290	25,385	77,577	81,316
Wind Turbine Technician	42,145	43,320	78,713	36,536	48,769	28,767	48,680	74,970

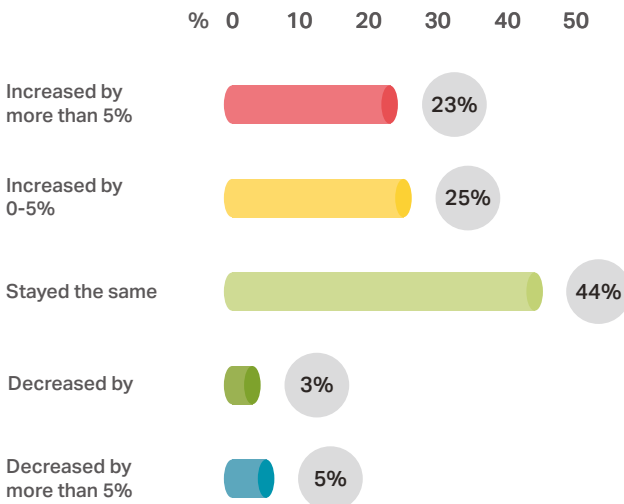


CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	430	554	498	236	583	277	466	601
Biomass Engineer	276	328	410	198	423	224	315	453
Business Development Manager	589	643	600	185	665	301	482	585
Civil/Structural Engineer	385	453	479	288	556	439	510	541
Commercial Manager	437	721	615	363	523	493	486	588
Construction Manager	500	567	581	182	698	324	568	819
Design Engineer	349	523	444	408	409	437	451	580
Electrical Engineer	315	459	479	235	615	251	397	617
Energy Engineer	290	443	427	215	498	223	322	405
HSE Manager	537	625	529	148	601	192	503	684
Maintenance Engineer	395	548	500	283	596	180	414	671
Marine Engineer	347	438	510	213	670	220	437	534
Mechanical Engineer	458	655	463	251	695	269	498	761
Operations Manager	485	498	513	154	576	354	514	512
Project Engineer	510	604	550	198	501	234	572	602
Project Manager	444	727	585	345	761	304	489	759
QA/QC Manager	505	572	479	120	685	213	599	860
Renewable Energy Consultant	364	460	445	161	445	258	375	524
Solar Engineer	402	629	383	199	532	243	446	661
Wind Farm Project Manager	602	624	565	331	710	181	586	593
Wind Turbine Technician	401	558	394	253	505	205	354	536

Seventy-one per cent of hiring managers were optimistic of a pay increase, while only 59 per cent report positive movement this year.

PAY CHANGES AMONG WORKERS IN THE LAST 12 MONTHS (non-hiring professionals)



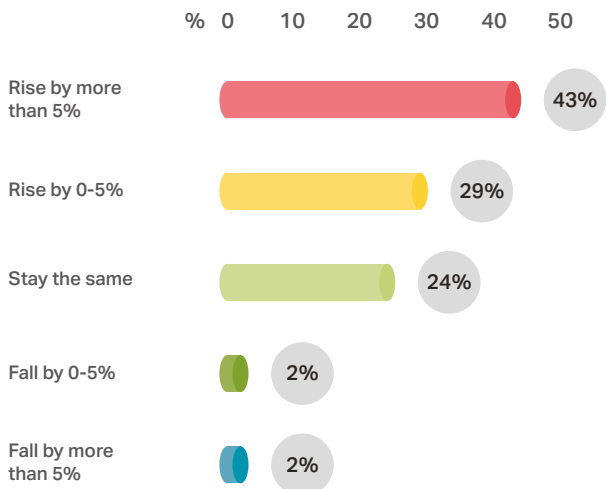
72%
of hiring managers and non-hiring professionals alike foresee pay increases in 2020.

Even so, both those with and without hiring responsibility are optimistic of pay increases on the horizon. Seventy-two per cent of hiring managers and non-hiring professionals alike foresee raises in 2020, with 41 per cent of hiring managers anticipating increases of more than five per cent. Very few respondents expect a reduction.

“Renewables is the most optimistic sector in terms of pay, and with lots of momentum behind it, the sector is succeeding. Yet, as the data shows, this success may not equate to booming salaries, and for hiring managers, it’s important to keep abreast of sentiment on the ground.”

– Janette Marx

PAY EXPECTATIONS AMONG WORKERS IN THE NEXT 12 MONTHS (non-hiring professionals)



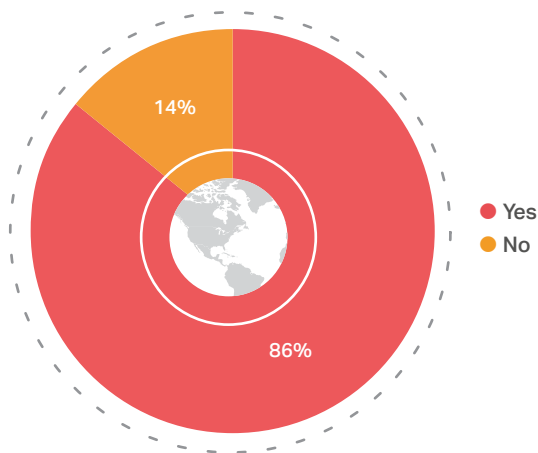
Airswift CEO, Janette Marx, reflects: “Renewables is the most optimistic sector in terms of pay, and with lots of momentum behind it, the sector is succeeding. Yet, as the data shows, this success may not equate to booming salaries, and for hiring managers, it’s important to keep abreast of sentiment on the ground.”



3. GLOBAL MOBILITY

The percentage of professionals interested in relocating for work remains steady, with only a slight decrease from last year to 86 per cent. Europe retains pole position (30 per cent) while North America (19 per cent) overtakes the Middle East (15 per cent, down four per cent from 2019).

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



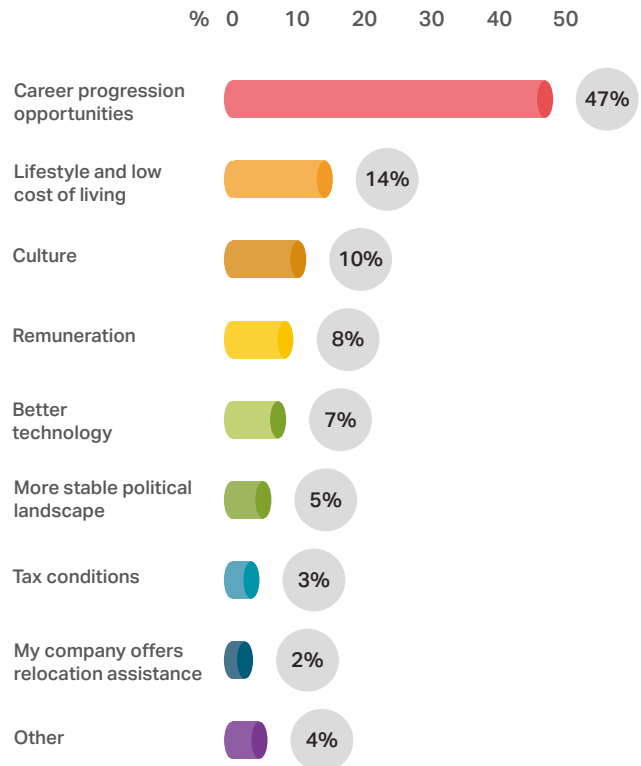
“Europe has been the market leader for some time, but other regions are closing in,” says Hannah Peet, MD at Energy Jobline. “Despite a challenging political landscape, it’s encouraging to see support for the renewables industry in North America growing, although a little surprising that Asia didn’t make the top three.”

As in other sectors, the main driver for relocation is career progression, followed by lifestyle and low cost of living, and culture.

30%

of those who would consider relocating for work would prefer to move to Europe – making it the most popular destination.

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



“Europe has been the leader for some time, but other regions are closing in. Despite a challenging political landscape, it’s encouraging to see support for the renewables industry in North America growing.”

– Hannah Peet

Should Asia do more to promote itself? Marx outlines: “Asia’s renewables market has taken off in a big way, but it can’t benefit from lessons learned abroad if it’s not attracting relocators. Career progression is always top of professionals’ lists – so, Asia needs to be more vocal about the volume of exciting projects in the region, and how that can be a catalyst for careers.”



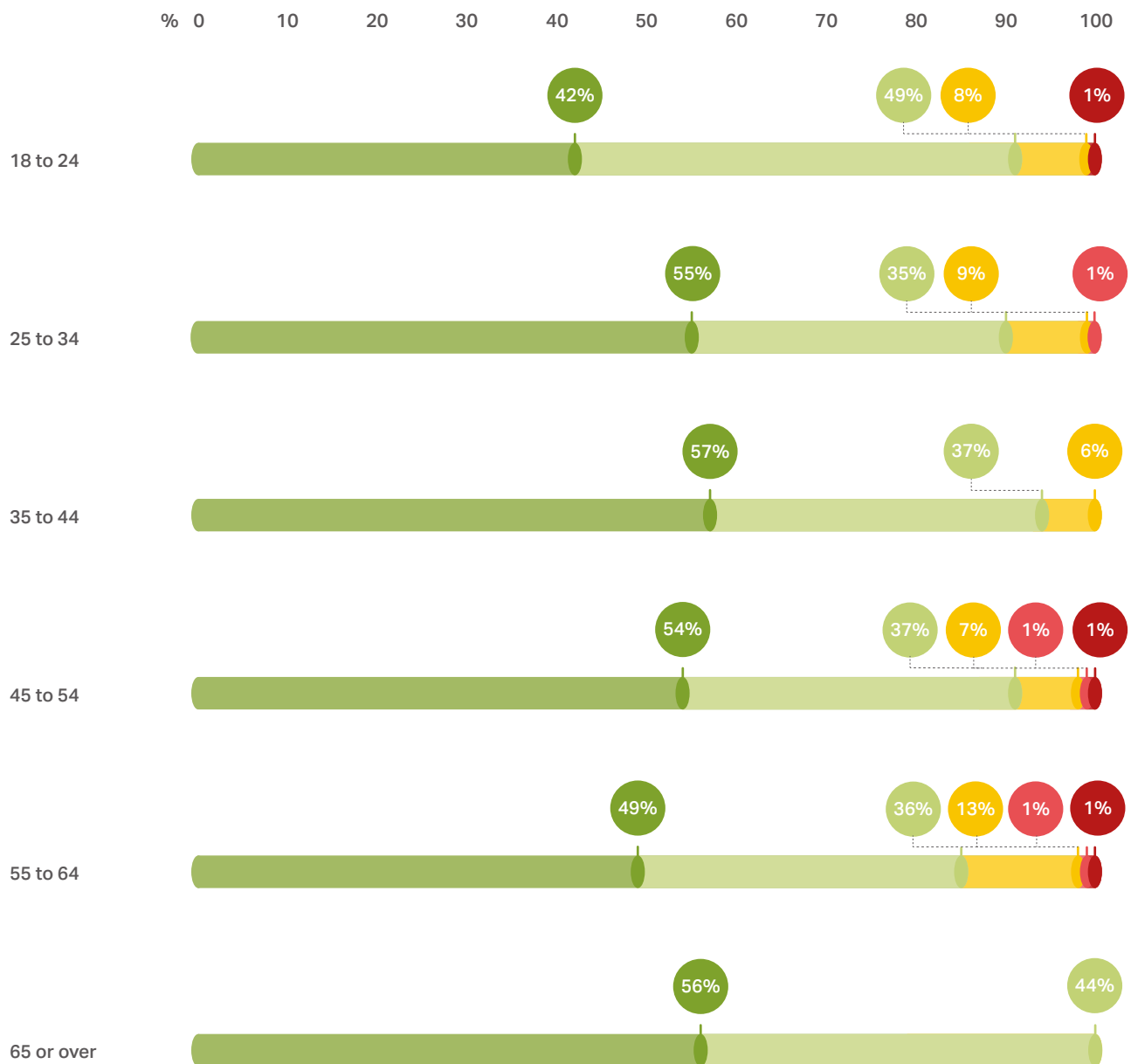
4. AN ENGAGING CULTURE?

Renewables professionals of all ages feel engaged by their work. Ninety-one per cent of younger professionals (aged under 25) say they are engaged, while for their older counterparts (aged 55 or over) it falls slightly to 88 per cent. Indeed, over half of all respondents (54 per cent) say they are very engaged.

“This is a great result” says Peet. “And it bucks the wider trend in the industry wherein younger professionals are less engaged – in renewables many have deep-rooted ethical motivations, which encourage higher engagement.”

HOW ENGAGED ARE YOU WITH YOUR PROFESSIONAL LIFE?

● Very engaged ● Quite engaged ● Neither engaged nor disengaged ● Quite disengaged ● Very disengaged





However, high levels of engagement do not necessarily translate into heightened feelings of appreciation. Only 42 per cent of professionals say their organisation values them a lot. And while this is a slightly higher figure than other sectors, the fact remains that a further 43 per cent feel that their organisation values them, but not as much as it should.

Echoing the trend in the wider industry, half of professionals say a team that works well together is most important to professional engagement. Thankfully, nearly three-quarters (70 per cent) also say they are happy with their team's performance.

91%

of younger professionals feel engaged by their professional lives.

"For many, a role in renewables is more than a job, it's a lifestyle," Peet notes. "It's a mission people get behind. And being part of a team that pulls together can be a powerful motivator. That said, only eight per cent of professionals highly value connections with colleagues outside of work, which is a surprise."

"This is a great result. And it bucks the wider trend in the industry wherein younger professionals are less engaged – in renewables many have deep-rooted ethical motivations, which encourage higher engagement."

– Hannah Peet

"Though the sector has laudable engagement figures, some rumblings of dissatisfaction remain. It may want to be more proactive with its people to keep them happy."

– Janette Marx

Second overall, and a clear favourite with women, is training, learning and development opportunities (57 per cent for women, 42 per cent for men). Both men and women put flexible working opportunities third while working with cutting-edge tools and technologies is a close fourth.

42%

of respondents feel their employer values them a lot.

Half of professionals (49 per cent) are satisfied with the benefits and remuneration packages on offer, although a quarter disagreed. Similarly, while 41 per cent are satisfied with opportunities for progression, 29 per cent disagree.

Marx summarises: "Though the sector has laudable engagement figures, some rumblings of dissatisfaction remain. The sector may want to be more proactive with its people to keep them happy."



WHICH FACTORS MOST AFFECT YOUR PROFESSIONAL ENGAGEMENT?

● Female ● Male





5. SKILLS AND TRAINING

REFLECTION REQUIRED

Is the sector training regime proactive enough? Thirty-nine per cent of professionals claim their company does not regularly invest in training and development, although younger professionals are more positive (33 per cent). Twenty-six per cent of respondents say they have had no access to training with their current employer this year.

There's no need to ring the alarm, says Peet: "In comparison to its peers, this is a positive result for renewables. It is a fast-growing sector and staff typically receive regular training to keep up with developments. It's not something they should take for granted though, as it only takes a few months for a new skills gap to appear."

For those that have received training, only 18 per cent say it was to broaden their skillsets while 15 per cent point to preparation for their future career.

"Given the rate of change, too little focus on future skillsets is a cause for concern," Peet remarks.

"This is a fast-growing sector and staff typically receive regular training to keep up with developments. It's not something they should take for granted though, as it only takes a few months for a new skills gap to appear."

– Hannah Peet

For those who did receive training, instructor-led classroom-based training was most prevalent (42 per cent) with online courses and leadership development programmes in second and third respectively. As in other sectors, women are less likely to be placed on leadership development programmes (16 versus 22 per cent).

While the results largely marry with how staff prefer to receive training, Marx notes a potential mismatch: "Economically, online courses make sense, particularly as more professionals work remotely. Yet, it ranks poorly in terms of how staff actually want to learn."

"Economically, online courses make sense, particularly as more professionals work remotely. Yet, it ranks poorly in terms of how staff actually want to learn."

– Janette Marx

Do companies need to think differently? Practical hands-on activities (40 per cent), academic and professional certifications (37 per cent) and coaching and mentoring (35 per cent) are all more desirable options than online learning. In the digital age, the personal touch appears to be as valued as ever.

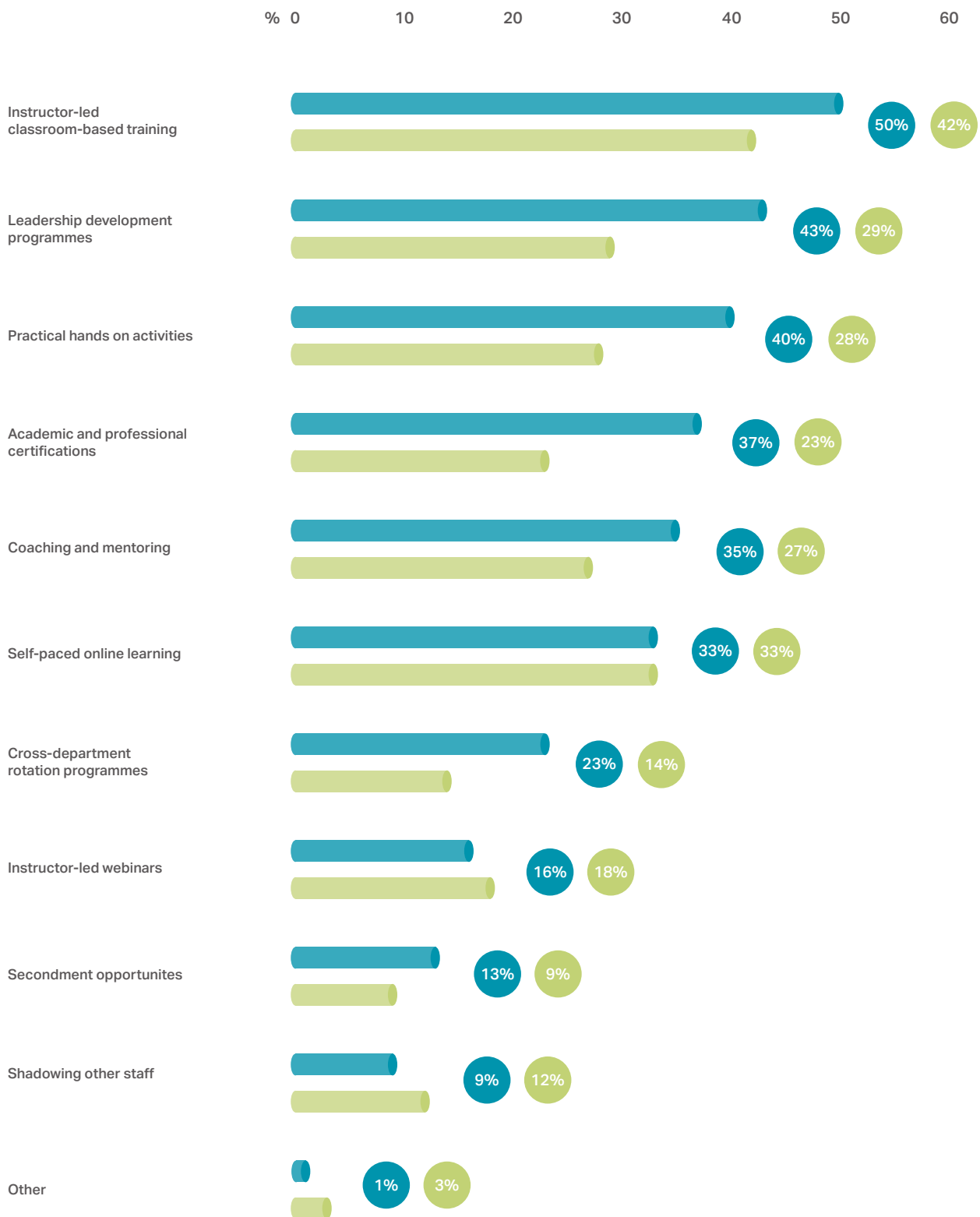
39%

of professionals claim their company does not regularly invest in training and development.



TRAINING PREFERRED VS TRAINING RECEIVED

● Training preferred ● Training received





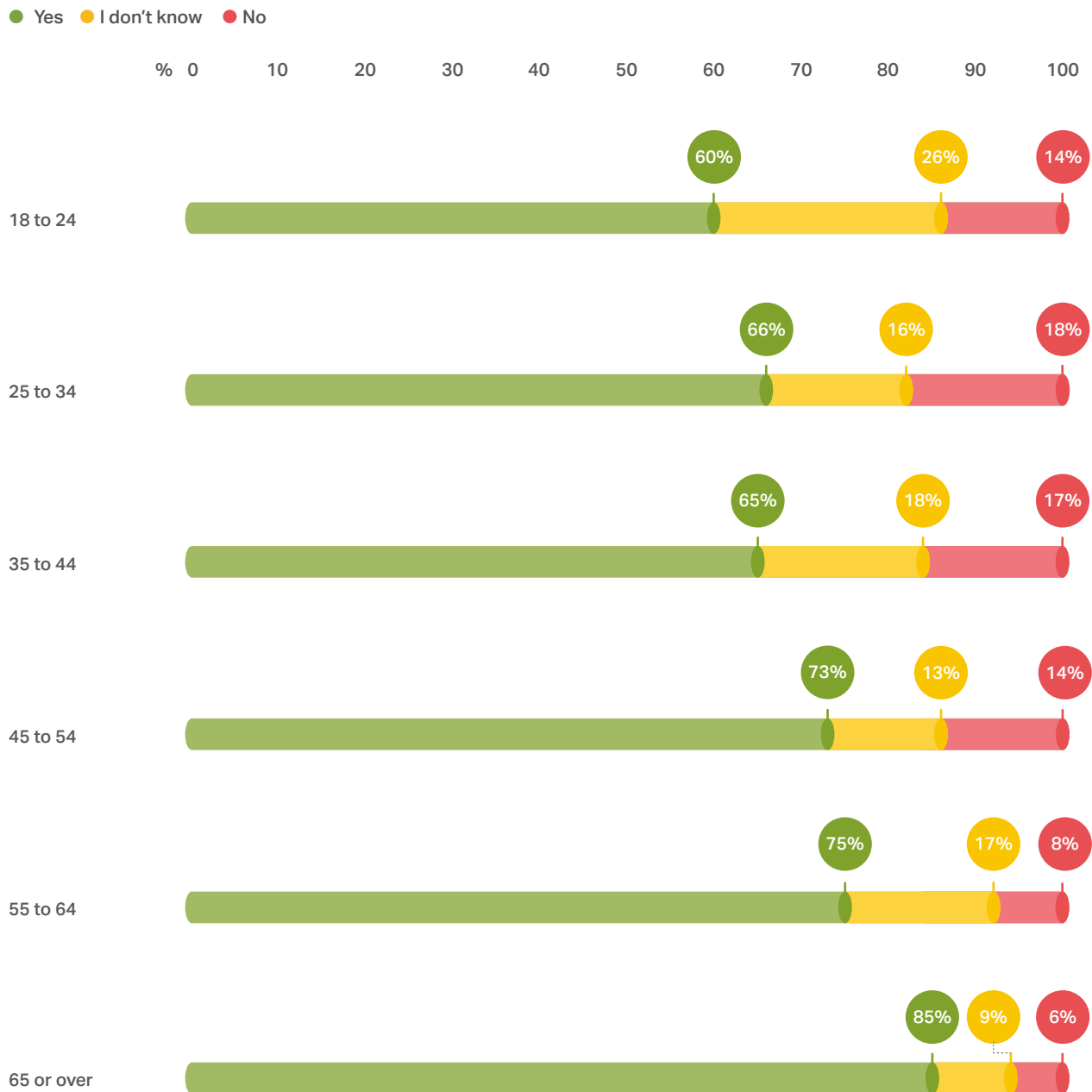
6. DIVERSITY

SIGNS OF PROGRESS?

Two-thirds (68 per cent) of employees feel that their organisation values the perspectives of people with different backgrounds and beliefs equally. Only 15 per cent disagree.

On the surface, this looks promising. But a closer look reveals deep disparities between younger and older employees. Only 60 per cent of under 25s think their organisations value diversity, against 77 per cent of those over 55.

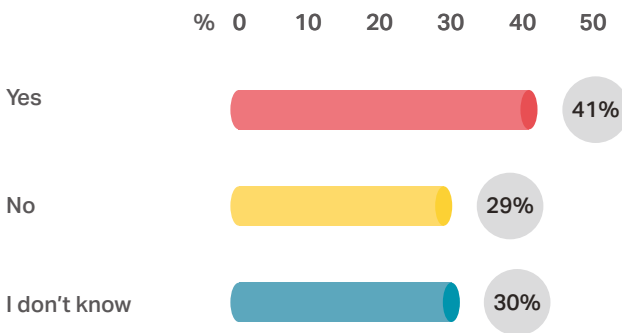
DOES YOUR ORGANISATION VALUE THE PERSPECTIVES OF PEOPLE WITH DIFFERENT BACKGROUNDS AND BELIEFS EQUALLY?





Hiring managers are substantially more positive (72 per cent versus 64 per cent of those without hiring responsibility) – an optimism that could be considered somewhat misplaced given that fewer than half (49 per cent) report that their companies have initiatives in place to improve diversity and inclusion.

DOES YOUR ORGANISATION OFFER ANY DIVERSITY PROGRAMMES? (non-hiring professionals)



“Much of what we’re seeing here is a sign of the times. Diversity and inclusion are becoming critical success factors for many businesses, and younger generations are prepared to hold employers to a higher standard than older generations used to. With that in mind, it’s about time the 50 per cent that don’t have some kind of initiative think about putting one in place.”

– Hannah Peet

68%

of employees feel that their organisation values the perspectives of people with different backgrounds and beliefs equally. Only 15 per cent disagree.

Peet explains: “Much of what we’re seeing here is a sign of the times. Diversity and inclusion are becoming critical success factors for many businesses, and younger generations are prepared to hold employers to a higher standard than older generations used to. With that in mind, it’s about time the 50 per cent that don’t have some kind of initiative think about putting one in place.”

49%

of hiring managers report that their companies have initiatives in place to improve diversity and inclusion.



7. ATTRACTING AND RETAINING TALENT

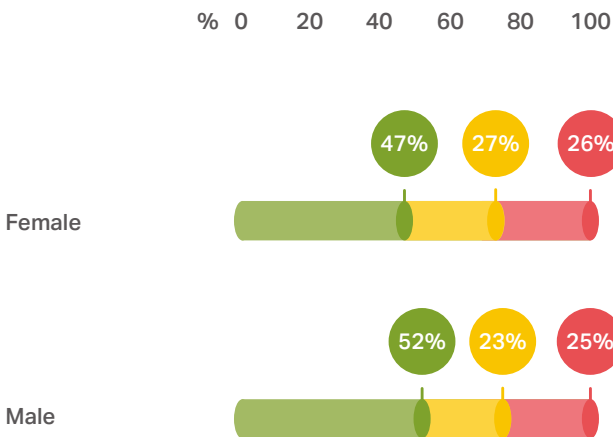
DON'T TAKE LOYALTY FOR GRANTED

The renewables crowd is a highly engaged bunch, but do they feel loyalty in return? Fifty-one per cent think so, although a quarter disagree.

With one of the highest responses in the industry, it's no surprise that almost half of professionals (46 per cent) expect to remain with their organisation over the next three years – the highest of any sector. A little under a third (28 per cent) expect to leave.

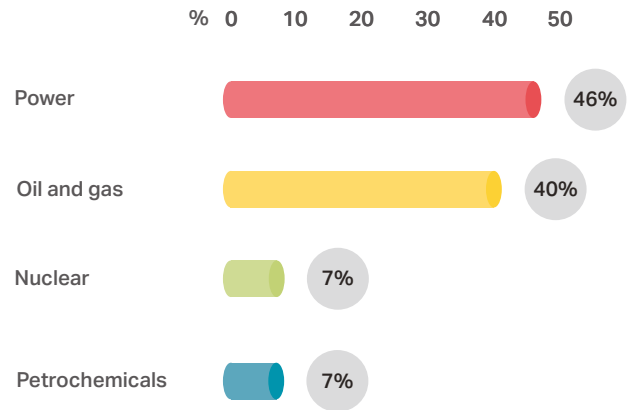
IS YOUR ORGANISATION LOYAL TO ITS EMPLOYEES?

● Yes ● I don't know ● No



Pay and career progression are top motivators both ways. Of those looking to leave, 66 per cent say new challenges or opportunities to progress would encourage them to stay while a pay rise is a close second (63 per cent). And of those expecting to remain with their current employer, 79 per cent could be convinced to leave if offered progression opportunities or a new challenge and 63 per cent could be swayed by an increase in salary.

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



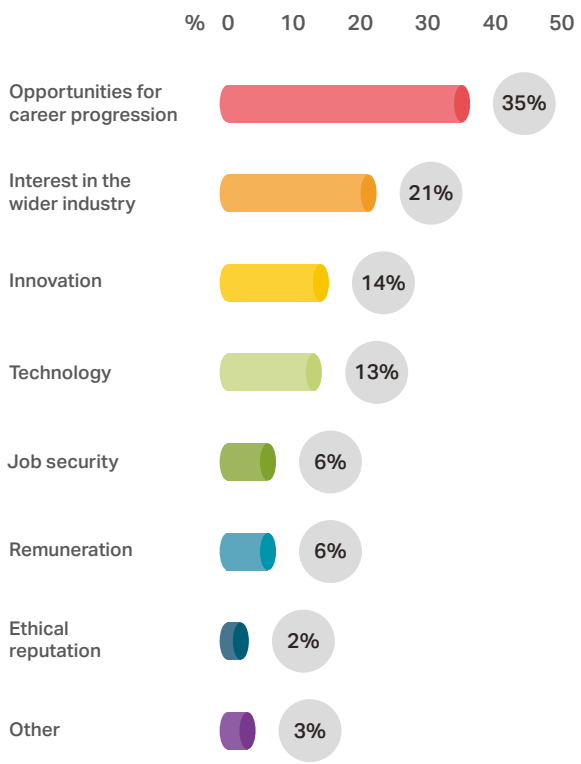
Eighty per cent say they would consider switching in the next three years. Naturally, power (46 per cent) is the preferred destination, but oil and gas is also popular, favoured by 40 per cent of respondents.

51%

of renewables professionals think their organisation is loyal to its employees, although a quarter disagree.



WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



Marx comments: "While job satisfaction and making an impact might be high on many peoples' lists, this won't keep them from seeking better opportunities elsewhere. Renewables has some thinking to do if it wants to ward off poaching by its older siblings."

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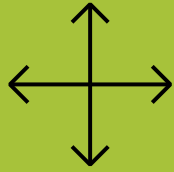
"The renewables sector holds more promise than most in terms of professionals' exposure to career progression as a result of natural market evolution. Yet, companies shouldn't rely on this to get them through; packages and career progression opportunities need to be as competitive as anywhere else on the market."

– Hannah Peet

Echoing motivations to move companies, opportunities for progression is a key motivator for those considering a sector switch (35 per cent) while an interest in the wider industry (21 per cent), innovation (14 per cent) and technology (13 per cent) serve as runners-up.

80%
of respondents say they would consider switching to another sector in the next three years.

"The renewables sector holds more promise than most in terms of professionals' exposure to career progression as a result of natural market evolution. Yet, companies shouldn't rely on this to get them through; packages and career progression opportunities need to be as competitive as anywhere else on the market," Peet adds.



Summary Renewables

The renewables sector is readying itself for rapid growth as it cements its place on the world stage. It's a change that will open new paths for professionals at every level. Yet, as the workforce grows, companies will need to start thinking bigger too. Those that rely solely on optimism and engagement to keep staff in post may find themselves left behind.

As the sector comes of age, it will need to pay closer attention to get the finer things right – upskilling, benefits packages and exciting progression opportunities will all have a role to play in keeping the workforce highly engaged.







GETI
Global Energy Talent Index

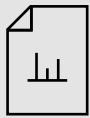


energyjobline

Nuclear



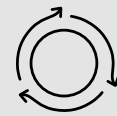
Contents: Nuclear



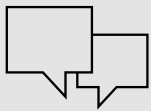
Demographics **81**



Salaries **82**



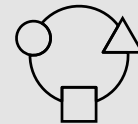
Global mobility **85**



An engaging
culture **86**



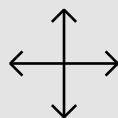
Skills and training **89**



Diversity **91**



Attracting and
retaining talent **93**



Summary **95**

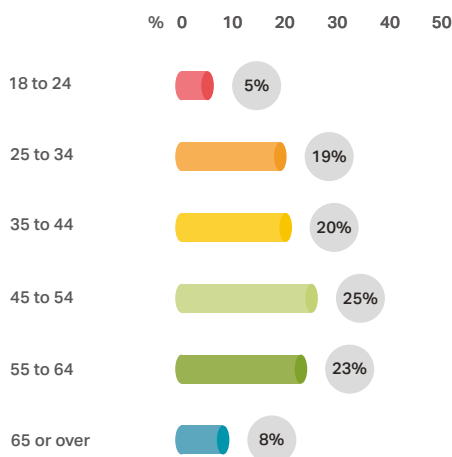


Nuclear

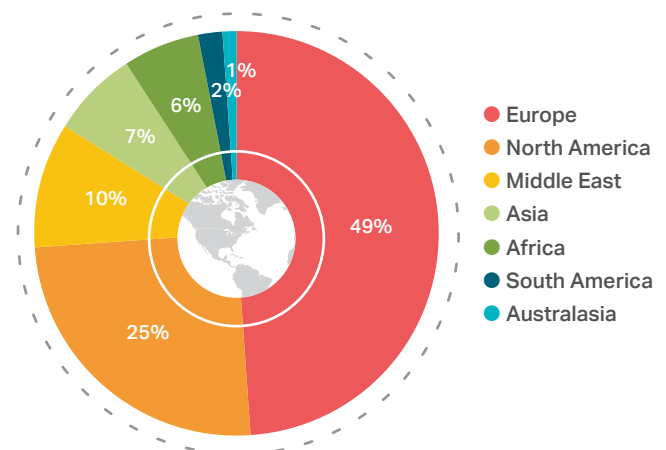
Steady and stable are the watchwords of the nuclear industry, and that has traditionally been reflected in its workforce. To a large extent, the sector has done well to match the advantages of a steady environment with climbing salaries and good training performance. However, professionals' roots may be shallower than companies think, and there is work to do to ensure the sector keeps its best talent.

1. DEMOGRAPHICS

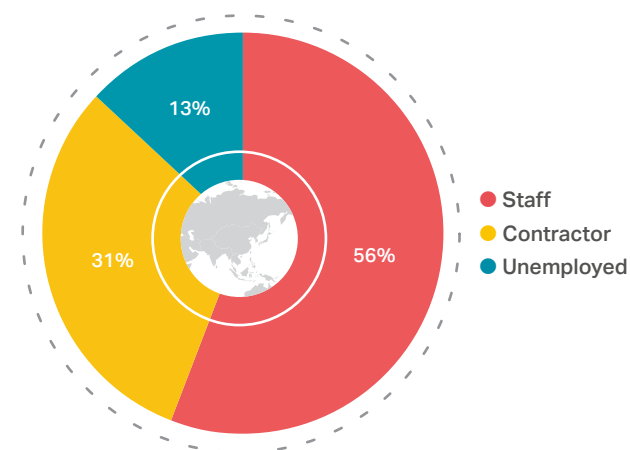
AGE



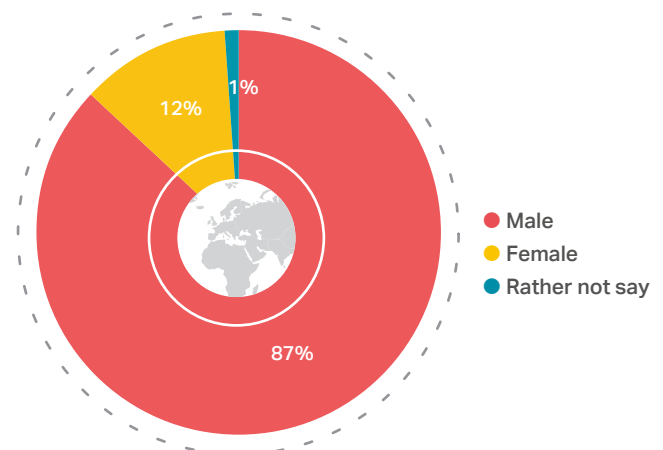
REGION



EMPLOYMENT STATUS



GENDER



2. SALARIES

UNDIMMED OPTIMISM

It's a good time to work in the nuclear industry when it comes to pay. Fifty-four per cent of employees have received a pay rise in the last year – the second highest among the energy sectors surveyed and a notch above last year's result (52 per cent).

However, this sector actually has the lowest percentage of respondents to receive a raise of more than five per cent – just 16 per cent of nuclear professionals were so lucky.

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

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	48,977	65,888	60,832	33,628	63,559	53,683	67,801	96,147
Business Development Manager	54,918	67,437	60,207	24,260	62,665	52,900	72,541	91,607
Chemical Engineer	54,390	60,703	55,742	30,209	59,808	48,700	55,602	97,174
Commercial Manager	53,955	69,844	62,102	52,155	72,524	85,980	64,615	83,416
Commissioning Manager	40,841	66,830	57,821	44,290	65,686	51,900	65,412	94,413
Construction Manager	72,503	65,576	54,184	25,477	65,217	62,500	96,900	123,816
Electrical Engineer	58,649	62,252	62,364	34,625	57,575	56,300	74,453	111,828
Environmental Engineer	39,381	70,054	65,103	24,914	64,386	49,400	70,154	95,048
Facilities Manager	43,358	54,672	67,046	18,345	53,853	49,000	70,342	68,655
HSE Manager	47,727	79,793	68,658	48,212	59,259	56,900	83,982	85,805
Maintenance Engineer	43,143	64,722	54,292	42,718	55,464	56,300	59,662	86,948
Mechanical Engineer	79,900	71,414	56,628	36,981	63,011	51,200	77,300	125,533
Nuclear Engineer	39,167	85,400	69,387	36,986	61,690	40,600	55,124	118,794
Planner/Scheduler	34,187	67,940	57,500	40,567	59,389	38,900	59,800	87,957
Process Engineer	55,980	53,936	56,752	32,341	84,370	51,100	70,141	123,554
Project Manager	65,561	73,210	60,615	27,668	71,239	64,300	81,241	120,696
Purchasing Manager/Buyer	34,500	60,110	68,038	44,713	67,600	76,788	57,621	82,472
QA/QC Manager	42,702	61,900	56,722	16,831	61,661	42,100	65,534	98,800
R&D Scientist	39,221	71,183	49,329	38,404	65,725	48,200	52,351	86,016
Supply Chain Manager	42,583	64,715	54,995	29,447	57,153	42,600	65,141	73,830
Training Coordinator	36,874	46,067	79,162	23,407	62,899	48,000	58,098	66,570

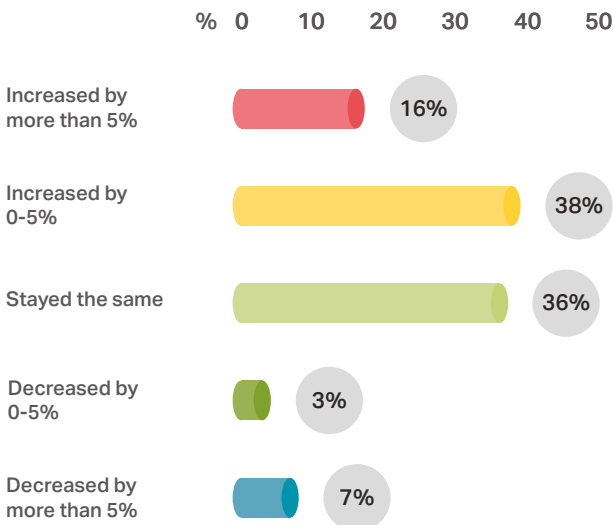


CONTRACT WORKER DAY RATE, USD (GLOBAL AVERAGE BASED ON SIX YEARS' EXPERIENCE)

	Africa	Asia	Australasia	CIS	Europe	Latin America	Middle East	North America
Averages	412	487	475	247	574	285	478	661
Business Development Manager	425	570	534	174	545	306	482	581
Chemical Engineer	366	418	398	216	445	231	397	555
Commercial Manager	431	505	474	373	521	614	515	591
Commissioning Manager	468	562	541	380	664	254	541	770
Construction Manager	491	578	556	182	670	265	603	884
Electrical Engineer	532	503	472	247	528	265	530	772
Environmental Engineer	294	494	440	178	453	207	425	618
Facilities Manager	412	484	481	131	558	232	503	502
HSE Manager	430	547	523	338	723	188	480	490
Maintenance Engineer	428	490	505	318	556	182	436	586
Mechanical Engineer	359	397	390	265	496	284	404	881
Nuclear Engineer	366	404	506	265	545	294	448	791
Planner/Scheduler	416	447	432	302	541	169	463	551
Process Engineer	402	460	492	231	609	255	511	856
Project Manager	437	472	449	198	753	319	510	836
Purchasing Manager/ Buyer	457	530	491	368	645	389	566	598
QA/QC Manager	455	509	464	121	679	216	485	784
R&D Scientist	452	506	438	275	495	450	409	599
Supply Chain Manager	356	470	420	210	613	386	428	517
Training Coordinator	260	395	494	167	446	188	415	451

Energy Jobline MD, Hannah Peet, explains: “‘Steady’ is the word I’d use to describe this sector. It’s one of the few places where you still see jobs for life. People are steadily progressing their careers and their salaries inch upwards, but this isn’t the place to look for dramatic rises and falls.”

PAY CHANGES AMONG WORKERS IN THE LAST 12 MONTHS (non-hiring professionals)



That doesn’t diminish the sector’s optimism. Even more professionals expect a raise next year (68 per cent) – edging above the 64 per cent that said the same last year. Almost a quarter (22 per cent) expect a jump of more than five per cent.

“‘Steady’ is the word I’d use to describe this sector. It’s one of the few places where you still see jobs for life. People are steadily progressing their careers and their salaries inch upwards, but this isn’t the place to look for dramatic rises and falls.”

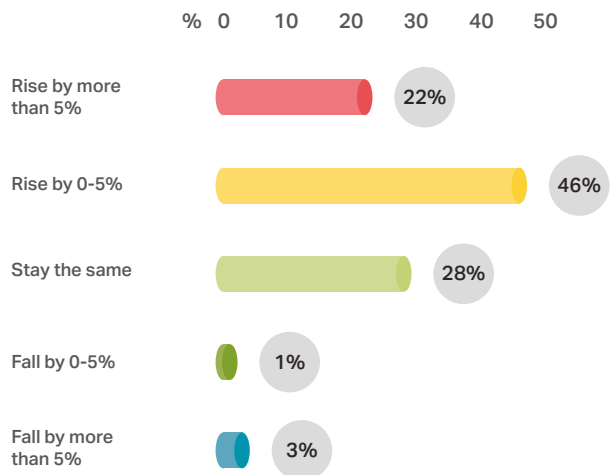
– Hannah Peet

70%

of hiring managers expect salaries to climb over the next year – 28 per cent by more than five per cent.

If that looks slightly out of line with actual performance last year, professionals can be encouraged that hiring managers in the sector are equally optimistic: 70 per cent expect salaries to climb and 28 per cent predict by more than five per cent.

PAY EXPECTATIONS AMONG WORKERS IN THE NEXT 12 MONTHS (non-hiring professionals)



Janette Marx, CEO, Airswift understands the optimism: “A few years ago there was quite a bit of decommissioning and some worrying stories. Now things look much healthier and professionals’ outlooks have perked up accordingly.”

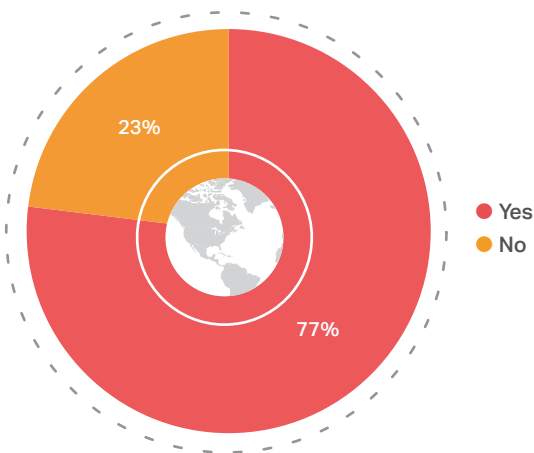


3. GLOBAL MOBILITY

PUTTING DOWN ROOTS?

Just over three quarters (77 per cent) of nuclear professionals say they are open to relocating to another region for work – comfortably the lowest proportion of the energy sectors and down from 83 per cent in 2019.

WOULD YOU CONSIDER RELOCATING TO ANOTHER REGION FOR YOUR JOB?



Those open to moving are mainly looking for career progression opportunities (31 per cent), followed by lifestyle (19 per cent) and culture (17 per cent). Those happy where they are point to proximity to family (51 per cent) and their children’s education (17 per cent).

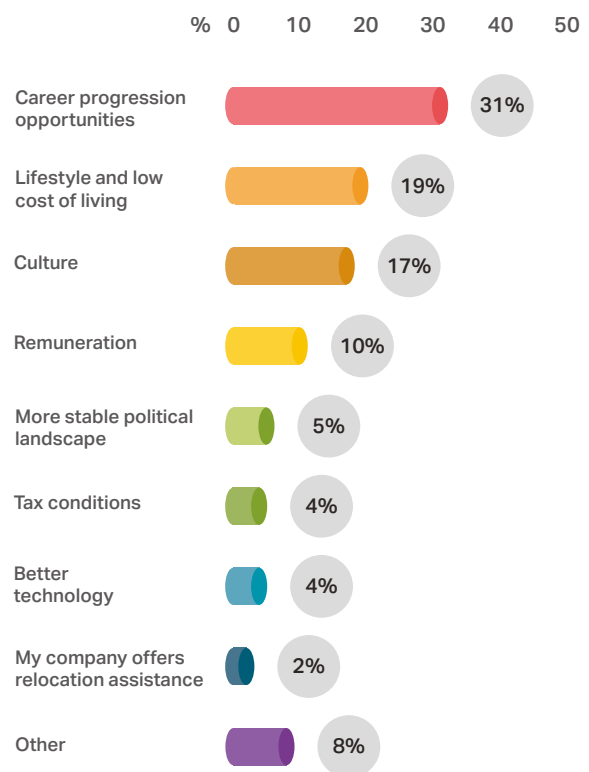
For Marx, “This is exactly what we expect from nuclear: it’s a sector where you put down roots and become embedded in the community. You expect to see less global movement. That said, I’m surprised to see less openness to movement than last year: there are more and more exciting projects emerging around the world.”

77%

of nuclear professionals say they are open to relocating to another region for work.

This pipeline of exciting projects may also explain where professionals most wanted to go. North America leads on 23 per cent, followed by Europe at 21 per cent and the Middle East at 20 per cent.

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



Peet observes that, “North America and Europe have traded places since last year, perhaps down to ongoing problems for headline European projects such as Hinkley, Flameville and Olkiluoto. The big surprise is to see the Middle East so close behind though: this region’s nuclear sector is still in its infancy, so it’s great to see industry professionals excited by it.”



4. AN ENGAGING CULTURE?

The nuclear workforce is settled, but is it engaged? To a large extent, yes. Eighty-four per cent of employees are engaged and 42 per cent are very engaged.

Though these figures are lower than in other sectors, Marx is unconcerned: "Remember that only two per cent are disengaged, and that you're inevitably less engaged when you've mastered a role than when you're concentrating on learning the ropes."

HOW ENGAGED ARE YOU WITH YOUR PROFESSIONAL LIFE?

● Very engaged ● Quite engaged ● Neither engaged nor disengaged ● Quite disengaged ● Very disengaged



This seems to be borne out by the fact that younger employees (up to 24 years old) report much higher engagement levels than their older peers (55 years or older).

However, respondents report more mixed impressions when it comes to feeling valued. Only 36 per cent say their organisation values them highly, and 40 per cent say they feel valued, but not enough. Sixteen per cent say they are not valued, more than any other sector.

Peet comments: "There is room for improvement versus other sectors, but these are still positive numbers. Despite traditionally lower salaries in nuclear, people still feel valued."

84%

of nuclear employees are engaged by their professional lives. Forty-two per cent are very engaged.

When asked what contributes to their professional engagement, employees were emphatic: a team that works best together is most important (50 per cent), followed by flexible working (44 per cent), with remuneration and benefits tied with training and development for third (both 37 per cent).

Differences do emerge according to gender though. While both men and women identify a cohesive team and flexible working as the two most important factors, training and development takes the bronze for women and remuneration and benefits does for men. Men are also more swayed by a sense of common purpose and, while it ranks highly for everyone, women are more concerned about flexible working.

Peet says that, "It's not just women calling for flexible working in nuclear, it's men too, which goes to show the family-orientated nature of this sector."

37%

are dissatisfied with the career progression opportunities on offer – six per cent more than those who declared themselves satisfied.

Nuclear also performs well in that 59 per cent say their organisation cultivates a sense of common purpose, 58 per cent say they work in a comfortable environment and 68 per cent say they work in a team that works well together. Despite the good news though, 37 per cent are dissatisfied with the career progression opportunities on offer – six per cent more than those who declared themselves satisfied.

Marx concludes: "Companies have performed well in creating strong teams, which is what nuclear professionals say they value most. However, it's a red flag that more are dissatisfied than satisfied on career progression: employers should take care that steady doesn't become stagnant."

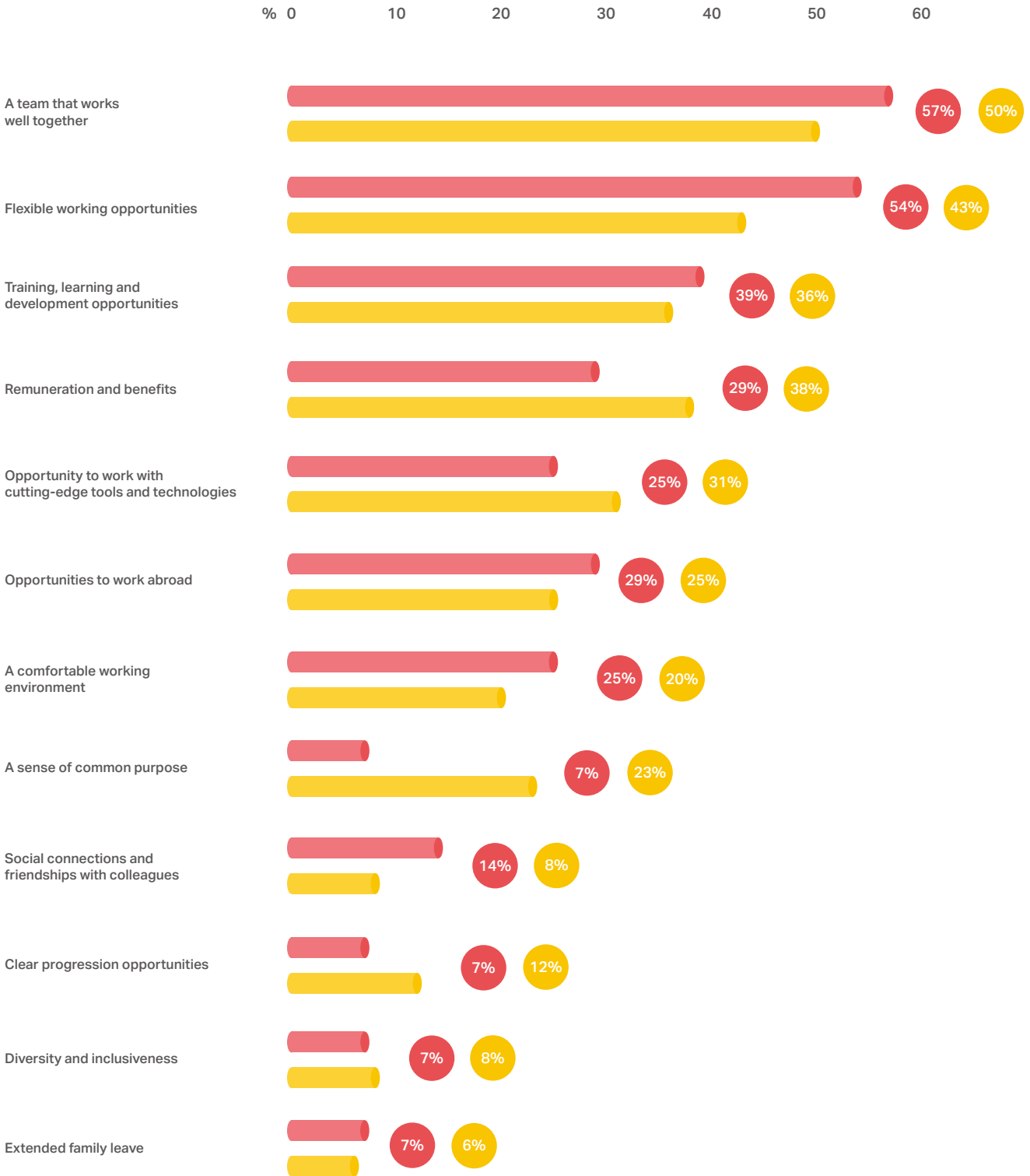
"Companies have performed well in creating strong teams, which is what nuclear professionals say they value most. However, it's a red flag that more are dissatisfied than satisfied on career progression: employers should take care that steady doesn't become stagnant."

– Janette Marx



WHICH FACTORS MOST AFFECT YOUR PROFESSIONAL ENGAGEMENT?

● Female ● Male





5. SKILLS AND TRAINING

CALLING ATTENTION TO THE DETAIL

The nuclear sector appears to make great efforts to train its workforce. Only 37 per cent of respondents report that they do not receive regular training and just 23 per cent say they have had no access to training in the last year – both figures are the lowest of all sectors surveyed.

This falls further for young professionals, of whom just 13 per cent don't receive regular training. Across the board, 71 per cent of those who do receive training say it is related to their current role, suggesting the sector invests seriously in bringing new talent up to speed. Yet fewer of these professionals report that they receive training to invest in new skills not directly related to their role (15 per cent) or to develop their future career (14 per cent).

“There is a difference between the training on offer and what professionals want. The nuclear sector is clearly investing in training but may get more out of that investment if it pays attention to the data and better aligns training delivery with how people want to learn.”

– Hannah Peet

There are disparities however, between how training is delivered and professionals' preferences. Of those who have been trained this year, most received instructor-led classroom-based training, followed by self-paced online learning and academic and professional certifications.

37%

of respondents report that they do not receive regular training – the lowest percentage of any energy sector.

By contrast, though classroom and online learning are the most sought-after training modes, preferences for leadership development programmes and practical hands-on activities are under-provisioned.

Gender disparities emerge too. Though women are more likely to have received training this year, they are more likely to have shadowed other staff – an unpopular training method liked even less by women than men (11 per cent versus 16 per cent).

However, as Peet notes: “There is a difference between the training types on offer and what professionals want. The nuclear sector is clearly investing in training but may get more out of that investment if it pays attention to the data and better aligns training delivery with how people want to learn.”

71%

of those who receive regular training say it is related to their current role.



TRAINING PREFERRED VS TRAINING RECEIVED

● Training preferred ● Training received





6. DIVERSITY

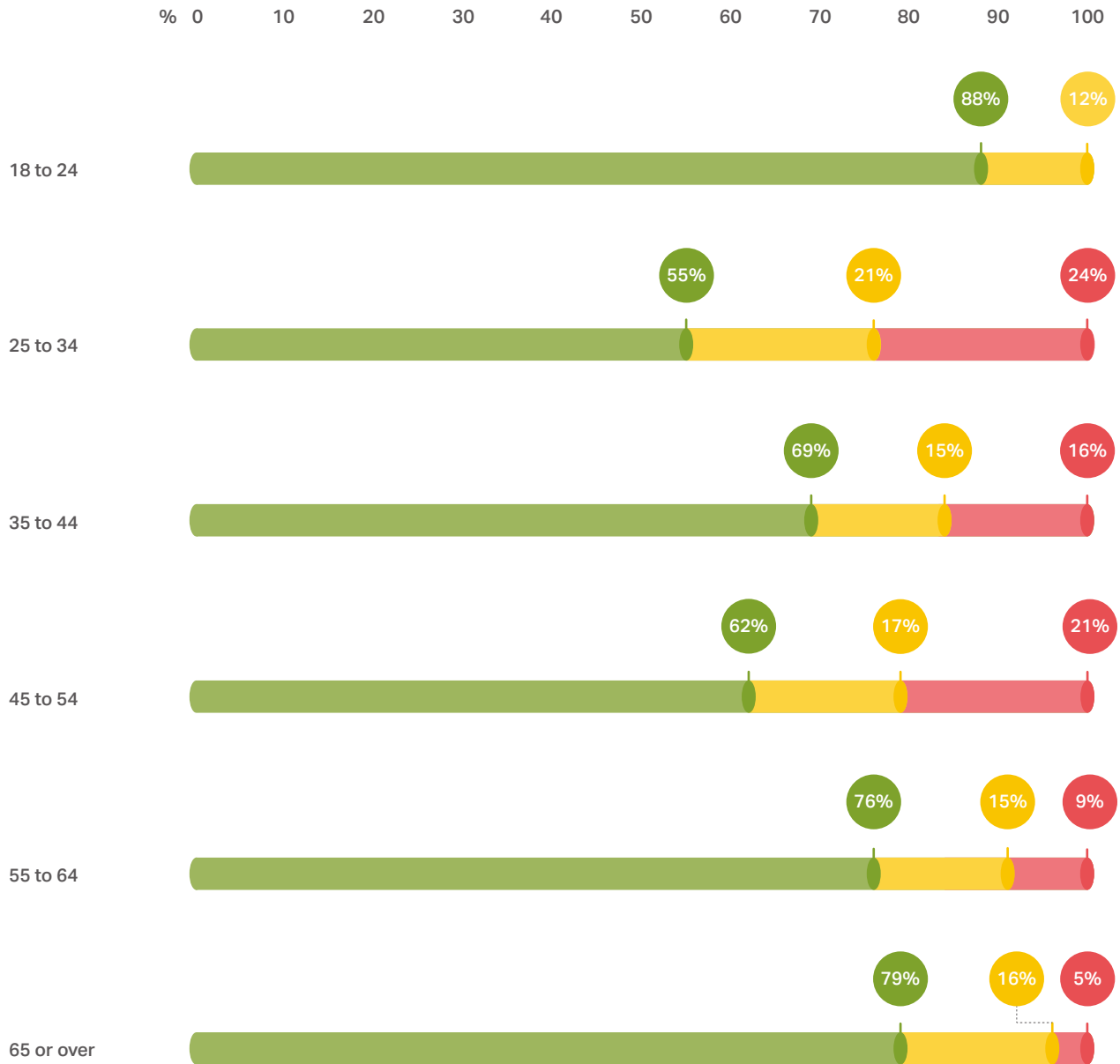
SIGNS OF PROGRESS?

Men and women are equally positive (68 per cent) that their organisation values the perspectives of people with different backgrounds and beliefs equally. However, the picture becomes more complicated with other demographic splits.

Younger professionals were the most positive, at 88 per cent. Older professionals were 77 per cent positive, and curiously only 63 per cent of those in their prime (age 25-54) agreed. Surprisingly, hiring managers were less positive than non-hiring professionals – contrary to every other sector.

DOES YOUR ORGANISATION VALUE THE PERSPECTIVES OF PEOPLE WITH DIFFERENT BACKGROUNDS AND BELIEFS EQUALLY?

● Yes ● I don't know ● No





Marx theorises: “Hiring managers are more likely to be in the prime of their career, which explains some of the alignment there. This suggests they are in the know, and perhaps have seen more than others and know better how they hire and just what challenges they face.”

Peet agrees: “The picture seems to be that the industry knows it has a diversity challenge and is taking steps to fix it – that’s positive. And the fact that younger people seem more impressed on this front – perhaps that means the initiatives are beginning to have an effect.”

68%

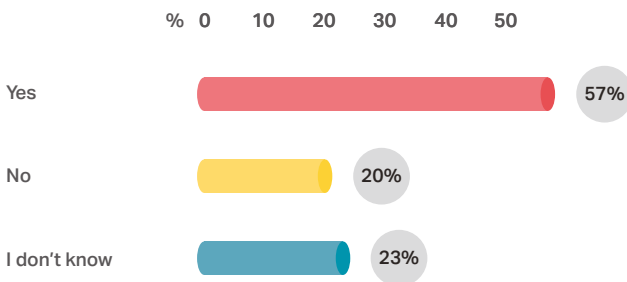
of men and women alike think their organisation values the perspectives of people with different backgrounds and beliefs equally.

This chimes with the fact that 57 per cent report their companies have programmes or initiatives in place in order to improve diversity and inclusion – the highest of any sector. This splits as 59 per cent of hiring managers and 56 per cent of non-hirers.

“The industry knows it has a diversity challenge and is taking steps to fix it – that’s positive. And the fact that younger people seem more impressed on this front – perhaps that means the initiatives are beginning to have an effect.”

– Hannah Peet

DOES YOUR ORGANISATION OFFER ANY DIVERSITY PROGRAMMES? (non-hiring professionals)



57%

of respondents report that their companies have diversity programmes in place – the highest percentage of any sector.

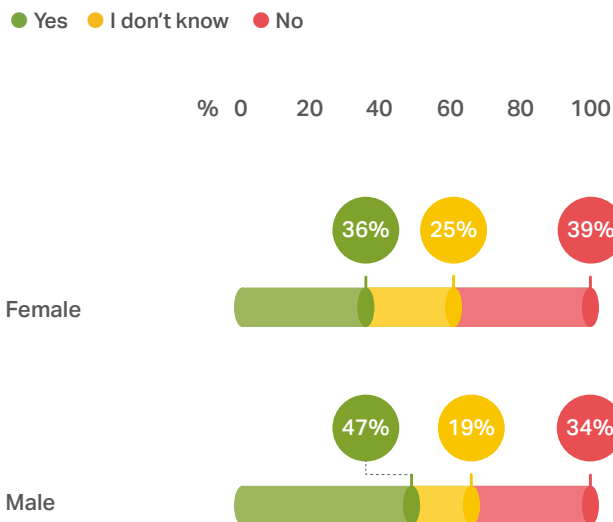


7. ATTRACTING AND RETAINING TALENT

QUESTION OF LOYALTY

Despite some good work on engagement and training, loyalty seems to be a trickier topic for the nuclear industry. Just 45 per cent of employees think their organisation is loyal to its employees, the second lowest of the sectors. More than a third disagree (35 per cent) – the highest result recorded. Women perceive less loyalty than men do, and younger employees are more positive than older colleagues (75 per cent agreement versus 55 per cent).

IS YOUR ORGANISATION LOYAL TO ITS EMPLOYEES?



However, 43 per cent still expect to stay where they are over the next few years – something for Marx that is reflective of the sector's stability: "Nuclear jobs are steady jobs, explaining why so many expect to stay despite perceived lower-loyalty. They have put down roots."

45%

of employees think their organisation is loyal to its employees. More than a third disagree.

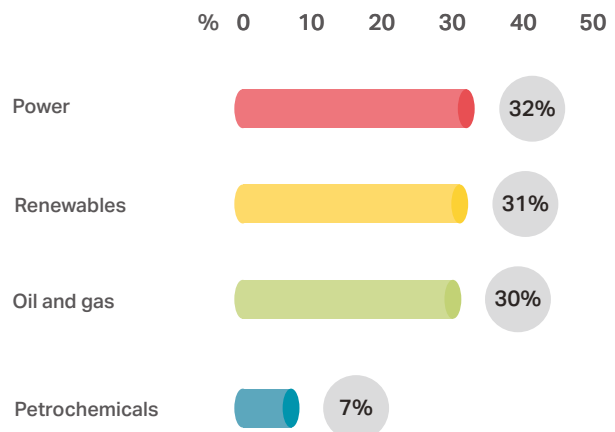
Of those that are looking to leave, 67 per cent could be prevailed upon to stay given the right progression opportunities, while 65 per cent say the same for a salary increase. However, of those likely to stay 81 per cent could be tempted away by more money, and 74 per cent by progression opportunities.

"Nuclear jobs are steady jobs, explaining why so many expect to stay despite perceived lower-loyalty. They have put down roots."

– *Janette Marx*

In fact, 82 per cent would consider switching sector entirely in the next three years. Power is the most popular destination, closely followed by renewables and oil and gas. Career progression is the primary motivator.

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





67%

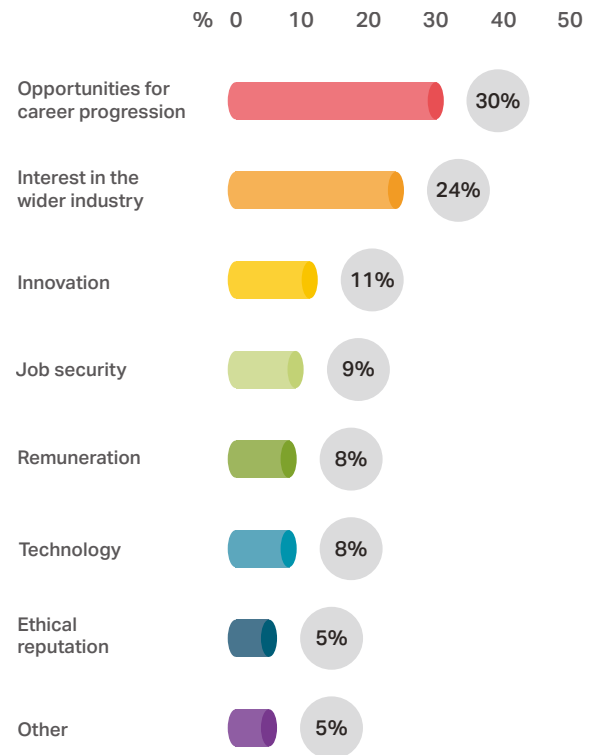
of those expecting to switch companies could be prevailed upon to stay given the right progression opportunities, while 65 per cent say the same for a salary increase.

Peet comments: "Nuclear is uniquely characterised by steadiness. Even so, people are willing to move and don't perceive their employees to be loyal to them. This suggests more must be done on employer branding and employee-communications in order to make them feel they are properly valued and appreciated."

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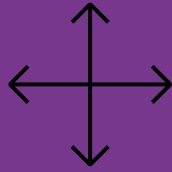
– Hannah Peet

WHAT IS YOUR MAIN REASON FOR CHOOSING THIS SECTOR?



82%

of nuclear professionals would consider switching sector entirely in the next three years.



Summary Nuclear

Like the power plants it builds and operates, the nuclear workforce has long been considered steady, a fixture of the local landscape and community. However, our results show that the sector's professionals may be less settled than they appear. Excellent performance on training and good

progress on salaries and engagement don't entirely eradicate lingering feelings of disloyalty and desires for greater progression. The industry faces a balancing act between playing to the advantages of a steady environment and somehow creating the progression opportunities of a more dynamic one.





Summary

At the dawn of a new decade, the future looks bright to an optimistic energy industry. As oil and gas continues to bounce back from its downturn, salaries across sectors remain on the up, and both those with and without hiring responsibility are hopeful that larger rises are on the horizon.

Of course, while professionals have reported raised salaries for a couple of years now, this year's rises were below the levels expected by respondents to last year's GETI. Not a crisis, by any means. But a reminder that the industry cannot afford to be complacent.

In this environment, it is clear that companies must think beyond pay and that wider cultural considerations have an important part to play in both the attraction and subsequent retention of talent.

In many respects, energy businesses appear to be on the right track. The workforce is highly engaged, with the overwhelming majority of respondents saying that they are engaged with their professional lives, and a great many describing themselves as "very" engaged.

It is clear, then, that though the industry finds itself in need of more talent, there is no shortage of passion and enthusiasm among those it already employs. But how else can companies ensure that this workforce remains engaged and motivated to deliver the pioneering projects upon which its future depends?

First, one thing is clear. "Hard" cultural factors remain of the utmost importance to energy professionals. Pay may no longer be undisputed as the number one consideration for those deciding whether to switch company or move between regions and sectors, but

that does not mean that professionals don't want to be rewarded for their hard work.

Indeed, now that career progression occupies the top spot, energy firms must redouble their efforts to make sure that every employee is working towards a professional development programme, tailored to their own passions and ambitions, as well as the commercial needs of the business.

An important part of this is learning and development opportunities. Indeed, these ranked second – behind a team that works well together – on respondents' list of the cultural factors most important to their professional engagement, across the industry.

It is clear that, when it comes to training, there is room for improvement. More than four-in-ten respondents believe that their organisation does not regularly invest in their training and development, and a third claim not to have received any training this year.

In part, this comes down to communications. For instance, for some, the only type of training that really counts is classroom-based training days. Other forms of learning and development opportunity can tend to fly under the radar.

Nonetheless, there is certainly room for more training to take place. And for it to be directed more effectively towards the needs of the workforce. Of those who believe they do receive regular training, most say that it is directed at improving their performance in their current role, with a minority reporting that their organisation is investing in supplementary skills or their future careers.

Furthermore, energy employers could perhaps do a little more to match the training they provide to the preferences of the workforce. In particular, practical hands-on activities and coaching and mentoring programmes proved popular among those surveyed, though a minority of respondents report having had access to such opportunities in the past year.

All things considered; the energy industry is at an exciting point in its history. Companies have shown admirable resilience in the face of a range of external factors and are beginning to reap rewards for their efforts.

There is also a diversity issue at play. While the majority of energy professionals are satisfied that their organisation values the perspectives of those with diverse backgrounds, it is worth acknowledging that women are noticeably less likely than men to have had access to leadership and development programmes.

Again, communication may have a role to play here. Indeed, when it comes to wider diversity and inclusion initiatives, it is telling that a majority of respondents are unaware of any schemes in place at their organisation. Hiring managers, however, are

more positive – indicating that, as with training, they ought to consider not only what initiatives they put in place, but how they roll them out.

However, that is not to say that enough initiatives exist. Around half of hiring managers across the industry claim not to have any programmes in place. This must improve, not least because younger professionals demand it. And if companies want to remain competitive as the already global battle for talent continues to develop into a cross-sectoral affair, they must respond not only to the demands of the workforce today – but of the needs of the future.

All things considered; the energy industry is at an exciting point in its history. Companies have shown admirable resilience in the face of a range of external factors and are beginning to reap rewards for their efforts.

Crucially, they are learning lessons along the way. And when it comes to culture, the lesson is simple: simply paying your employees more is no longer enough.

This year's most important lesson for employers is to offer a culture of fulfilment, wherein all workers, irrespective of their background, can see a clear path of progression. And are supported on that path with the training opportunities that they find most useful.

Only by learning this lesson, and making the changes it entails, can companies be sure of attracting and retaining the talent required to seize the plentiful opportunities presented by a promising future.

