

ENERGY OUTLOOK

2023 REPORT



Brunel

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TABLE OF CONTENTS

Executive Summary and Key Insights.....	3	Regional Insights	26
Introduction.....	5	North America.....	27
Navigating a Changing World.....	7	South America.....	31
Evolving Global Challenges	8	Europe	35
Employee Retention Under Pressure.....	11	Africa.....	39
Inflation and Climate Change as Key Motivators to Seek New Employment	14	Middle East	43
Championing the Global Energy Transition.....	16	CIS.....	47
Defining a New Path	17	Asia and Pacific.....	51
Rising to the Challenges	18	Demographics	55
Actions Speak Louder Than Words	19		
Political Economic Ambitions	20		
A Realistic Energy Transition	21		
Taking Collective Action for the Future	23		
Powering Positive Change.....	24		

EXECUTIVE SUMMARY AND KEY INSIGHTS

The 2023 Energy Outlook Report provides an overview of the current state of the global energy industry. It provides employers with practical advice on how to close their skills gaps, widen their talent pools, and attract and retain energy professionals in a rapidly changing market.

ABOUT THE STUDY

Brunel and Oilandgasjobsearch.com commissioned an independent research company to survey global energy industry recruiters and workers. For this year's report, we collected just over 24,000 data points from our global survey between August and November 2022, which saw jobseekers, recruitment professionals and leaders share their views on the industry.

The study identifies and explores the changes that have taken place over the last 12 months, and provides insights into what the coming years may look like. The report focuses on areas such as recruitment challenges, compensation, sustainability, candidate expectations, and retention in the energy sector.

As the political economic landscape continues to evolve, so does the global energy industry. In today's candidate-driven employment market, companies need to re-evaluate their recruitment strategies to ensure they align with the needs and expectations of top talent.

Climate change is high on the agenda of energy workers, and there have been some positive pledges and investments made by energy companies, governments, and other organisations.

Skills shortages, higher inflation rates, and rising energy prices have seen the industry provide job security and more stability than in previous years.



Some key insights from this year's report include:

Increasing opportunities leading to improved stability for energy workers

In the past 12 months, rising demand for energy has been driving opportunities and new investments in the industry, leading to the need for sectoral diversification and further innovation.

Rising inflation (40%), sustainable development/climate change (26%), and the reputation of the industry (24%), are all key drivers for energy workers to seek out new employment. However, with opportunities in the industry increasing, workers are confident in being able to sustain and develop their careers.

Climate change continues to be high on the global agenda

More than 9 in 10 energy workers (91%) are concerned about climate change. This year has seen some encouraging outcomes from events like COP27 and COP15, however, there is still work to do to ensure that industry attitudes align. Due to the political landscape and energy shortages, conventional energy is being more relied upon to boost renewable efforts and cover the shortfall.

Energy shortages are expected to continue into 2023

More than half (56%) of managers and leaders surveyed expect continued energy shortages in 2023 due to project delays caused by the pandemic, the withholding of gas supplies to Europe, and extreme weather conditions.



INTRODUCTION

2023 – A CANDIDATE MARKET DRIVEN BY A CHANGING WORLD

For over a decade, the Oilandgasjobsearch.com and energyjobsearch.com annual survey has been exploring the state of the energy industry from a recruitment perspective by collecting valuable insights from energy workers, leaders and recruiters across the world. In this third year of our collaboration with Brunel, we are proud to present our 2023 findings based on themes like rising energy prices, job market stability, climate change and the energy transition.

In 2023, the energy industry is in a state of flux, with workers' expectations changing right alongside inflation. Rising energy prices have seen an increase in some energy sector salaries and improved job security. How long this will last in a constantly evolving industry, however, remains to be seen. With job postings and the demand for candidates increasing, employers need to get creative in their approach to skill development and training to fill the existing skills gap and accelerate promotions.

In recent years, the energy industry has undergone a significant transformation. To be successful in today's environment, energy companies need to embrace change, be flexible and use the evolving landscape of how workers work as a competitive advantage. They need to meet employees where they are and accept that the future of the workplace is going to look different than it did in previous years. Companies that have a clear purpose, a strong culture and that value their employees will be the ones that stand the test of time.

The challenges facing the energy sector affect all of us as consumers, businesses, workers, and global citizens. Our survey finds that one of the top reasons given by energy workers

for seeking new employment is the industry's reputation (24%). As attitudes towards climate change evolve, the last 12 months have seen some positive outcomes from climate change events, and energy workers have become more conscious of the industry's reputation. In turn, this could present challenges for companies looking to attract new talent. Investment in new technology and the skills required to deliver net zero targets are still of utmost importance. We'd also expect to see employer branding and workplace culture taking a more prominent role in company recruitment strategies this year.

On the cusp of a new era of energy production and consumption, the energy industry's future is very exciting. Those who are able to keep up with the changes will be in a position to capitalize on the many opportunities that will arise.

I'd like to congratulate our team at Oilandgasjobsearch.com and energyjobsearch.com, as well as our partners at Brunel and Taylor Hopkinson, who helped shape this report. On behalf of our company, I wish you a pleasant reading.



SUSAN ARTHUR,
CEO, CAREERBUILDER
*Oilandgasjobsearch.com and
 energyjobsearch.com, the leading
 job sites for the energy market*

INTRODUCTION

2023 – THE SUCCESS OF THE ENERGY INDUSTRY HINGES ON THE SPECIALISTS DRIVING IT

On behalf of Brunel and Taylor Hopkinson I would like to extend a big thank you to all those energy professionals around the world that took the time to complete the Energy Outlook Survey.

Looking back at the events of 2022 I believe it's fair to conclude that it was a very unusual year. A year in which multiple political and economic events changed the landscape of the energy industry and reinforced just how essential the industry is to every human being here on planet earth.

Across the energy industry in every sector, innovation is driving change at a speed we have never experienced before. Our generation and those generations to come face unparalleled pressure to find, engineer, produce and distribute energy in the most controlled, safe and ethically responsible manner possible.

Within renewables we continue to see huge growth and opportunity due to the adoption of new innovative energy sources and increasing investments in renewable infrastructure and technology. In the sector of conventional energy the more traditional energy projects are being adapted or replaced to welcome new decarbonization initiatives that are reducing carbon emissions. The mining industry is generating new ways of delivering more sustainable and responsible methods of powering technology. Technology that results in the innovation that is driving change.

Change is no longer something the industry talks about, change is now in action.

An industry that is working smarter and faster than ever before, creating more jobs and more

economic growth. But while we make investments in technology and infrastructure we must not lose sight of the importance of investment in people. People with the talent, the motivation and the ambition to succeed and people with the confidence to think "outside of the box" and believe in their capability to change the world.

People are our future and their talent is priceless.

The success of the industry hinges on the specialists driving it and in return for their dedication, we as an industry have an accountability to offer attractive and stable career opportunities that deliver training, development and growth. It is our responsibility to deliver a future for those people who will deliver a future for our planet.

This year's Energy Outlook Report clearly demonstrates what talented specialists in the industry require. The voices of 24.000+ energy specialists has resulted in clear insights to help us as an industry pave the way to supporting the future.

It's up to us to listen and act.



JILKO ANDRINGA,
CEO, BRUNEL
INTERNATIONAL N.V.

*Connecting Specialists to
Pioneering Projects*

NAVIGATING A CHANGING WORLD

This chapter addresses the global challenges facing the energy industry. It explores how workers are being compensated amid rising energy prices, and what attracts workers to a role. We also look at employee retention, why workers leave the industry, and the underlying causes of the industry's skills shortages.



KEY INSIGHTS:

- 56% of managers and leaders expect continued energy shortages in 2023
- 81% of respondents are open to new job opportunities both in the energy industry and outside of it
- Those working in renewables are the least likely to search for opportunities outside of their current energy sub-sector

EVOLVING GLOBAL CHALLENGES

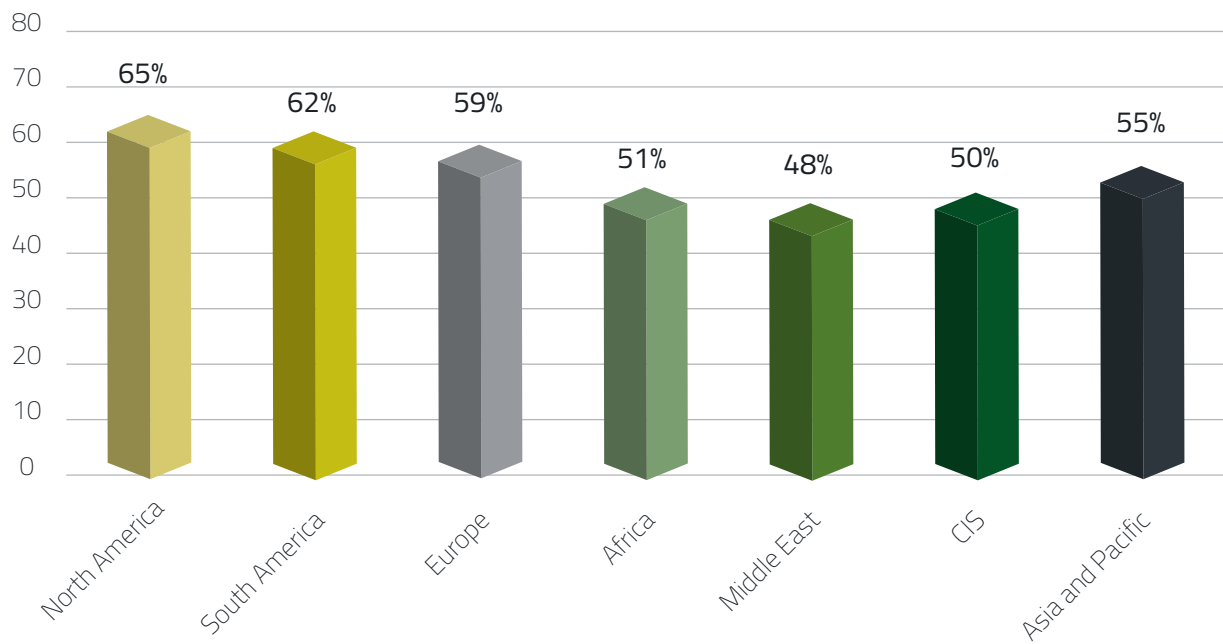
Global energy prices have continued to rise amidst economic uncertainty. Project delays caused by the pandemic, and the withholding of gas supplies to Europe in particular, have led to energy shortages across several regions. Our survey finds that 56% of managers and leaders expect these energy shortages to continue in 2023 with energy workers expecting to see North America (65%), South America (62%), and Europe (59%) impacted the most.

Both North America and South America are facing energy shortages. South America, in particular, is experiencing a collapse of its

hydroelectric generation due to drought. Whereas in Europe, the withholding of gas supplies from other countries has made wholesale prices of electricity and gas surge.

Looking at the wider energy landscape, the biggest changes experienced by energy workers in the past 12 months are inflation/rising prices (29%), hybrid/flexible/remote work (27%), and returning to the office (19%). Other changes include the stigmatisation of working in the oil and gas sector (18%), and companies communicating less about oil and gas but operations staying the same (17%).

WHERE WORKERS EXPECT ENERGY SHORTAGES IN 2023:



“ The energy landscape has seen a seismic shift in the past two years. The transition to renewables is no longer being driven purely from an environmental position. Mounting political and economic pressures are fuelling an increasing sense of urgency to improve global energy security, reduce prices worldwide and create skilled jobs. This is driving rapid investment in the sector, resulting in accelerated project commitments from governments and businesses. In response, we must streamline the risk assessment process, and private equity and banks must make funding available earlier to boost project financing. Over the past few years, the industry has adapted to meet these demands. The supply chain is now collaborating more closely than ever before and if we continue working together, we can overcome these challenges by finding innovative ways to finance and execute the ever-growing pipeline of projects we require to achieve net zero. ”

Due to rising energy prices, 58% of energy workers have received salary increases, compared to 48% in 2021. This shows that employers are taking note of rising inflation and shifting their focus toward employee retention. In order for workers to continue their standard of living, their salaries need to match the rate of inflation. Our survey reveals that 23% of workers have received an increase of 1 to 5 %, and 18% have received an increase of more than 10%.



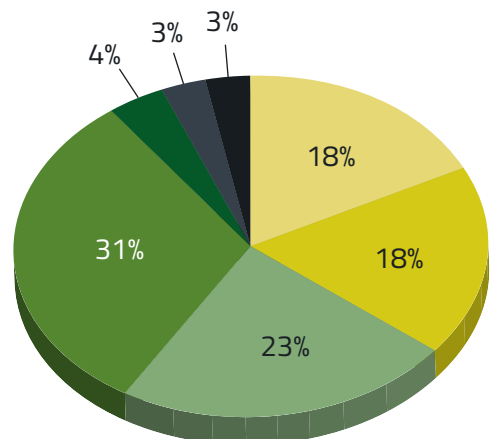
TOM HOPKINSON,
CEO, TAYLOR HOPKINSON
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HOW WORKERS DESCRIBE THEIR COMPENSATION COMPARED TO 12 MONTHS AGO:

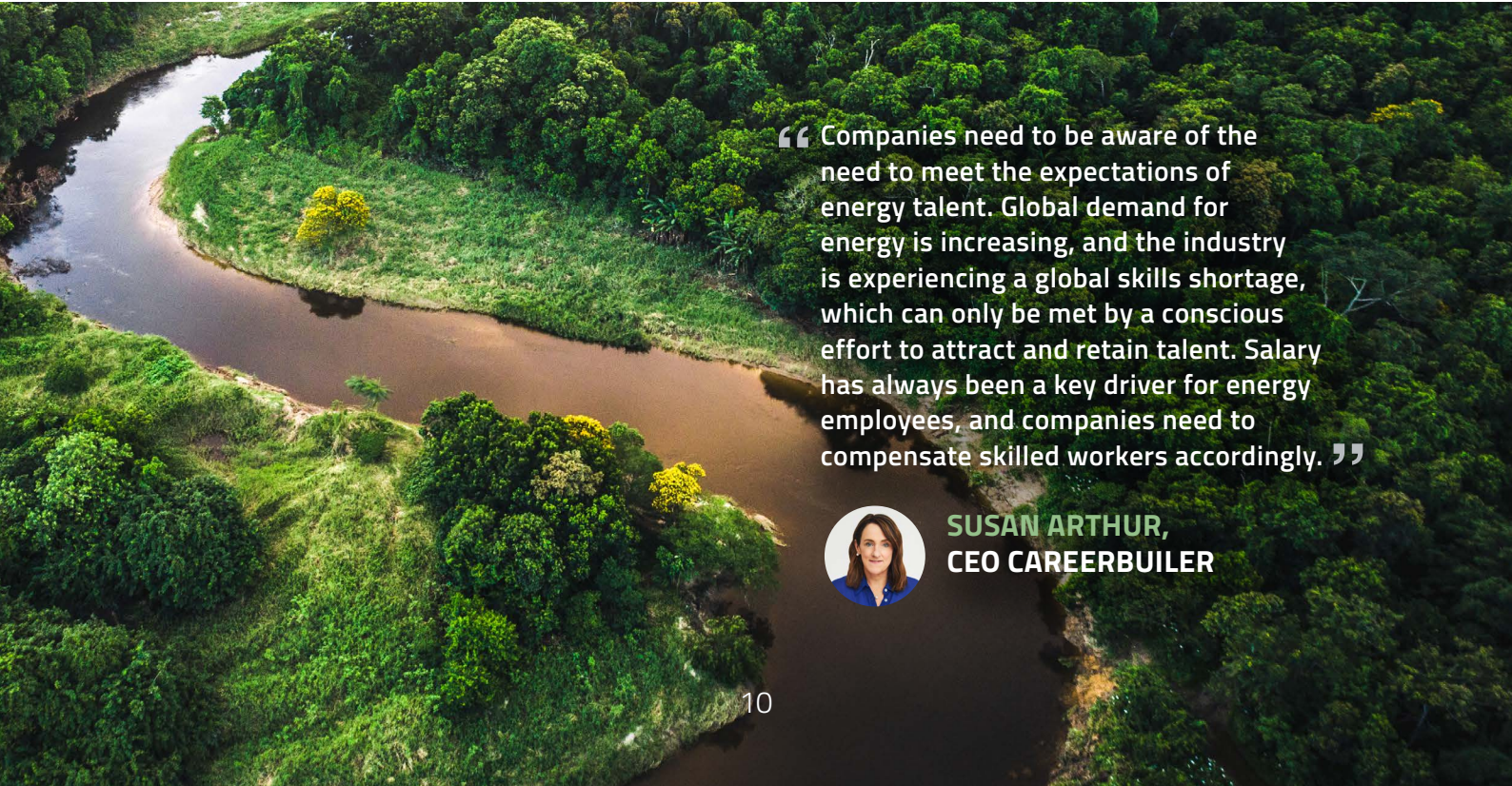
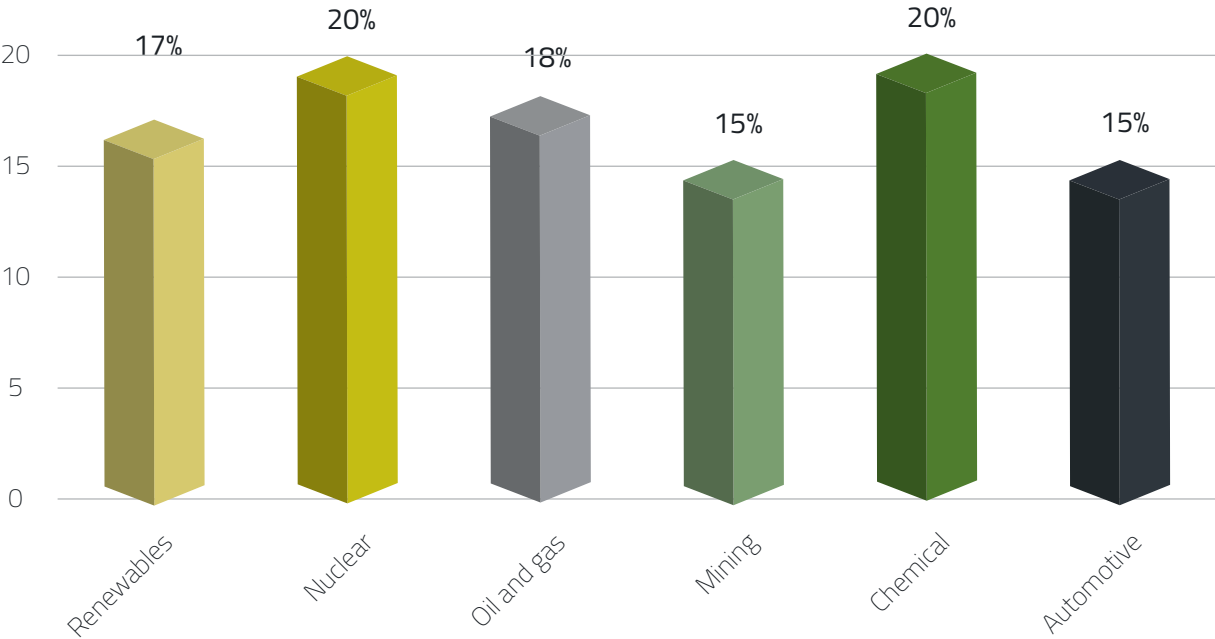
Salary has

- Increased +10%
- Increased 6-10%
- Increased 1-5%
- Stayed the same
- Decreased 1-5%
- Decreased 6-10%
- Decreased +10%



The top industry sub-sectors where workers have seen an increase in compensation by more than 10% are nuclear (20%), chemical (20%), oil and gas (18%), and renewables (17%).

% OF WORKERS THAT HAVE SEEN MORE THAN 10% COMPENSATION INCREASE



“ Companies need to be aware of the need to meet the expectations of energy talent. Global demand for energy is increasing, and the industry is experiencing a global skills shortage, which can only be met by a conscious effort to attract and retain talent. Salary has always been a key driver for energy employees, and companies need to compensate skilled workers accordingly. ”



SUSAN ARTHUR,
CEO CAREERBUILDER

EMPLOYEE RETENTION UNDER PRESSURE

In an ever-evolving industry, energy companies are under increasing pressure to retain talent. Of course, this also provides employers with the opportunity to listen to feedback and to make changes that will meet the expectations of top employees.

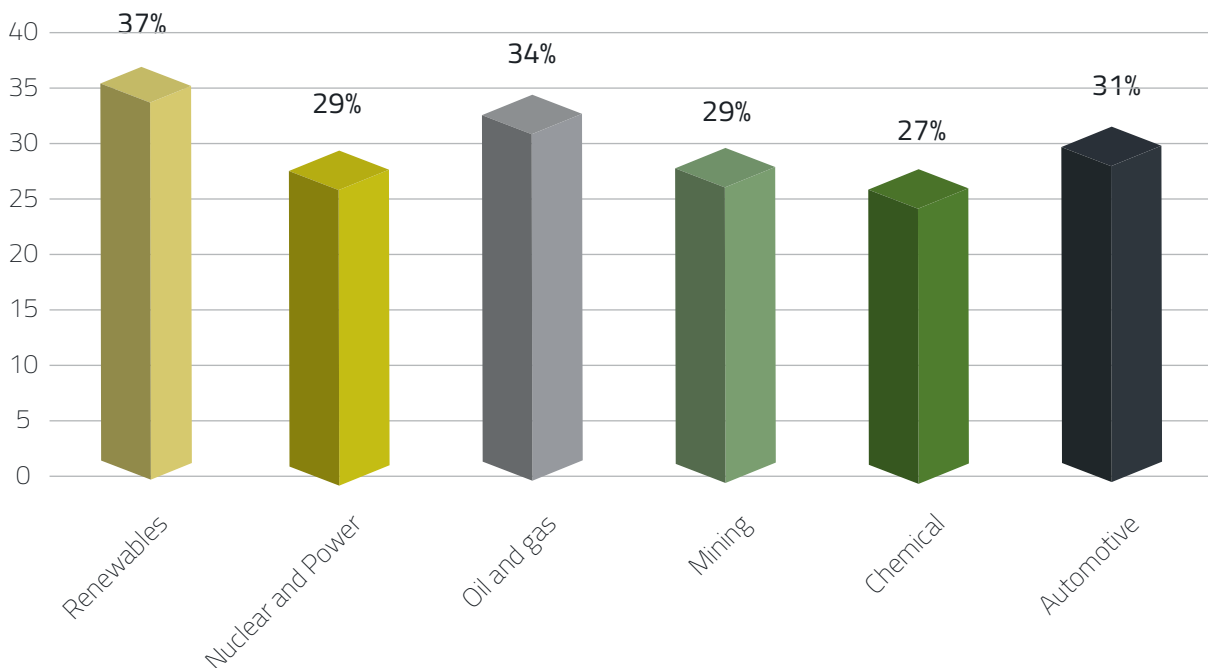
Our survey finds that 18% of workers are definitely considering an exit from energy in the next five years, compared to 20% in 2021. Although this percentage is still high, it does show that the industry represents stability more than it did last year. Coupled with the fact that more energy workers received a salary increase in 2022 than in the previous year, the sector does look to be providing increasing opportunities.

Of those who are seeking new jobs, 67% are currently searching outside of their current energy sub-sector.

The percentages highlighted below show those who are least likely to search for a new job outside of their current sector. As such, the sectors with the highest percentages are likely to be the most stable and least challenging for employee retention.

The top reasons energy workers are considering leaving the industry are low salary (33%), a lack of good benefits (29%), personal lifestyle changes (28%), a lack of personal development opportunities (22%), and a negative management style (22%).

PERCENTAGE OF WORKERS SATISFIED WITH WHERE THEY ARE AND LEAST LIKELY TO SEARCH FOR A JOB OUTSIDE THEIR CURRENT SECTOR:



When asked what percentage of a company's open positions have been unfilled for more than 3 months, energy leaders said an average of 35%. These findings show how challenging it can be to find talent to fill roles. As the industry continues to move towards decarbonisation, companies will increasingly need to hire for specialist roles, particularly those that make use of emerging technologies.

Our survey also reveals that the areas most affected by the energy skills shortage are Asia and Pacific (37%), Africa (35%), and North America (35%). Across these regions, inadequate succession planning for skills retention, education and training, and political instability are all cited as key causes.

“ In today's candidate-driven market, companies need to offer competitive benefits packages to retain talent. Benefits need to extend beyond the typical offerings of pensions and holiday pay to appeal to in-demand talent. Energy companies need to listen to employee feedback and tailor benefits to meet their specific needs. Better still, enabling employees to choose their own benefits package from a range of options would ensure that workers' expectations are met and that their loyalty is earned. ”



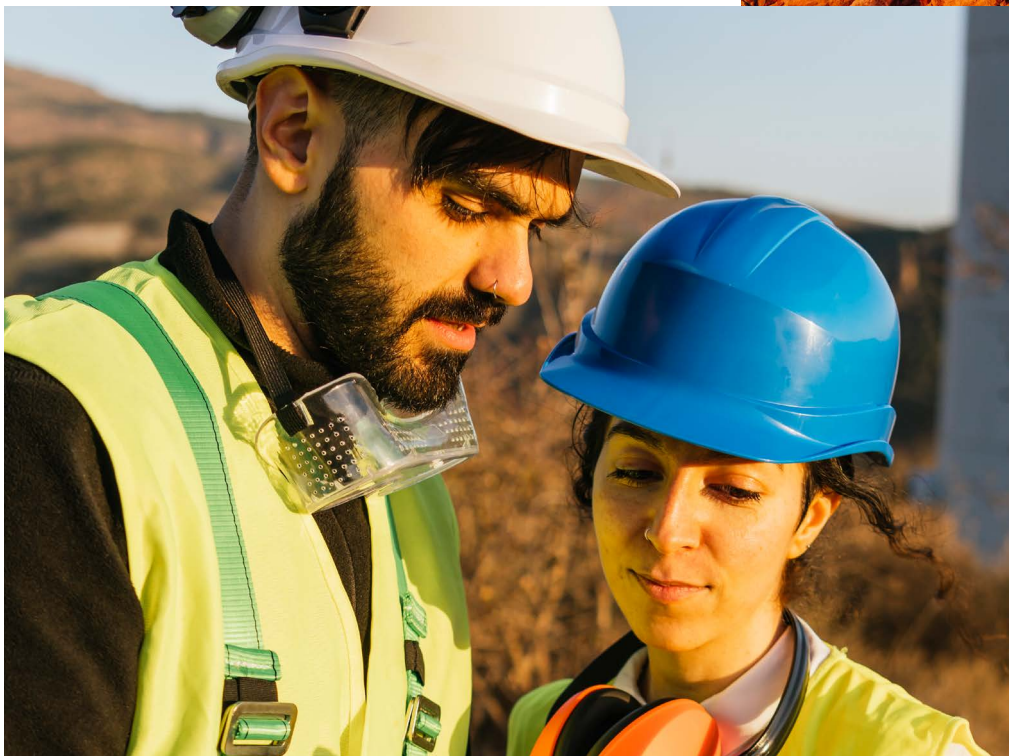
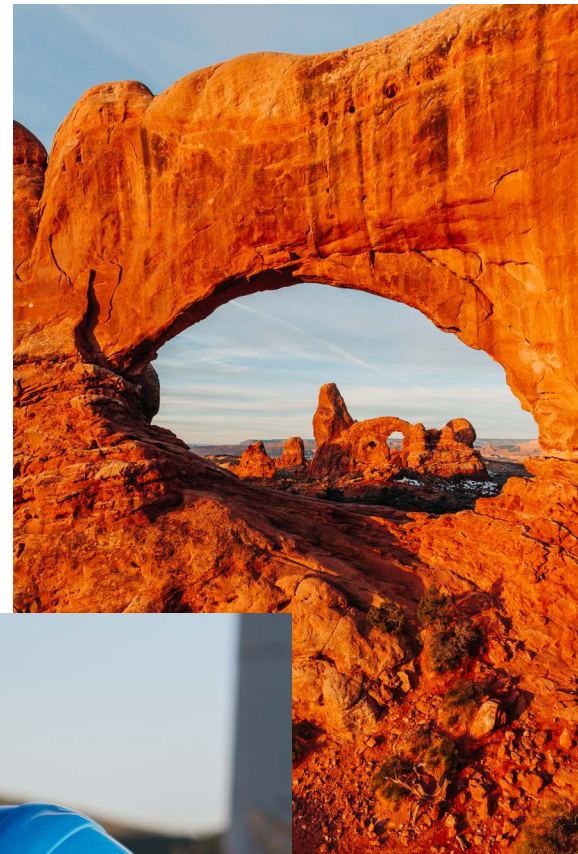
SUSAN ARTHUR,
CEO, CAREERBUILDER

THE KEY CAUSES OF SKILL SHORTAGES BY REGION:

REGION	KEY CAUSES OF SKILL SHORTAGES
North America	Loss of expertise due to ageing workforce Political instability Inadequate succession planning for knowledge transfer/skills retention
South America	Political instability Lack of motivational factors Environmental consciousness
Europe	Inadequate succession planning for knowledge transfer/skills retention Lack of diversity Loss of expertise due to ageing workforce
Africa	Inadequate succession planning for knowledge transfer/skills retention Education and Training Political instability
Middle East	Inadequate succession planning for knowledge transfer/skills retention Education and Training Lack of candidate consideration/inadequate pay
CIS	Education and Training Political instability Inadequate succession planning for knowledge transfer/skills retention
Asia and Pacific	Inadequate succession planning for knowledge transfer/skills retention Education and Training Lack of candidate consideration/inadequate pay

Our findings highlight how important it is for companies to offer training and development programmes. Apprenticeship schemes, for example, will attract more workers who need to learn new skills and gain experience, opening the door to those with diverse backgrounds and skill sets who want to move into the industry from other areas. Likewise, ongoing training programmes can help retain experienced employees who want to upskill and enter other sub-sectors of the industry.

Whereas training programmes can upskill employees in the short term, to combat long-term skills shortages, companies need to focus on educating the next generation of energy workers. Developing relationships with schools, colleges, and universities can ensure a steady talent pipeline in the future, and will make younger generations aware of the career options that are available in the energy industry.



INFLATION AND CLIMATE CHANGE AS KEY MOTIVATORS TO SEEK NEW EMPLOYMENT

As energy workers seek higher salaries in line with rising inflation, the industry is seeing an increasing number of people looking to develop their careers. The fact that more workers are actively searching for new jobs, and that they're concerned about climate change, shows that they're looking to the future in search of job security, satisfaction, and career prospects.

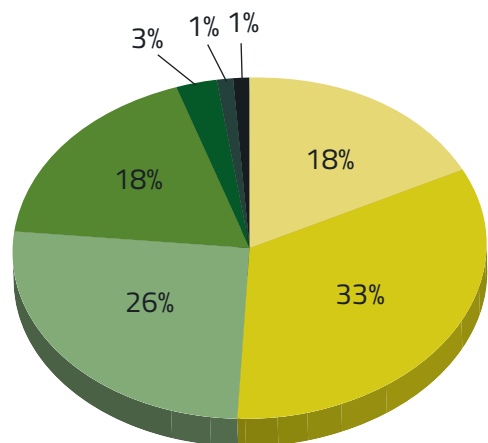
Our survey finds that more than 81% of workers are open to new job opportunities both in the energy industry and outside of it - a significant development that presents employers with opportunities to fill skills gaps.

The top reasons given for why energy workers are seeking new employment are 'rising inflation' (40%), 'sustainable development/ climate change' (26%), and the 'reputation of the industry' (24%).

When asked what would most attract a worker into a new role, the top answer was 'salary' (70% vs 65% in 2021), followed by 'career opportunities' (53% vs 50% in 2021), and 'job security' (53% vs 47% in 2021). 'Workplace culture/environment' (45% vs 37% in 2021), and 'training and development' (42% vs 37% in 2021) were also given as top reasons.

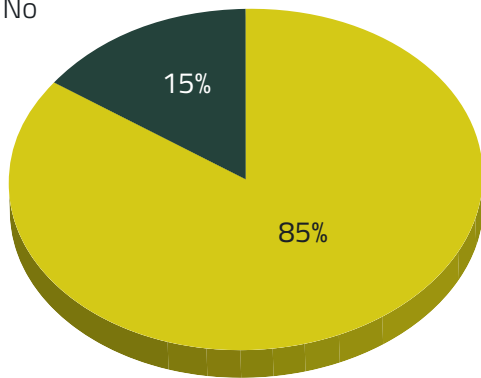
IN THE NEXT 12 MONTHS, LEADERS EXPECT SALARIES TO:

- Increase +10%
- Increase 6-10%
- Increase 1-5%
- Stay the same
- Decrease 1-5%
- Decrease 6-10%
- Decrease +10%



WHEN ASKED IF THEY WOULD MATCH OR INCREASE EXISTING EMPLOYEES' SALARIES TO EQUAL THE INDUSTRY SALARY BENCHMARK, LEADERS REPLIED:

- Yes
- No



The energy industry has always offered competitive salaries, especially in the oil and gas sub-sector. And as inflation continues to rise, in the short-term at least, many workers are seeking a higher income and better career prospects by moving into sub-sectors like nuclear, chemical, and oil and gas. However, as the industry strengthens its focus on combating climate change, the younger generation in particular see clean energy technologies as the future, and many are looking to move into the renewables sector.

Meanwhile, the conventional energy sectors are investing significant amounts of capital into developing processes and technologies that will increase storage and capacity. An increasing number of companies are also focusing on projects that will ease and speed up the energy transition, such as carbon capture storage.



CHAMPIONING THE GLOBAL ENERGY TRANSITION

Through collaboration and innovation, we can work across borders to promote energy as an exciting, essential industry to work and invest in. Operators and EPCs have started sharing best practices, knowledge, and talent in order to navigate challenges and create a better future that demands change. Championing the global energy transition means taking action to retain and motivate energy workers in an uncertain economy, overcome skills shortages, and encourage capital and technological investment.



KEY INSIGHTS:

- In the next 12 months, 33% of leaders expect energy sector salaries to increase by 5 to 10%
- According to energy industry experts, the key causes of skills shortages are inadequate succession planning for knowledge transfer/skills retention (38%), education and training (31%), and a lack of motivational factors (31%)
- The top challenge facing managers and leaders over the next five years is rising inflation (43%)

DEFINING A NEW PATH

As the political and economic landscape continues to shape the energy industry, companies need to acknowledge current trends and seek out new opportunities that will future-proof their business.

Our survey reveals that the top challenges facing managers and leaders over the next five years are 'increasing inflation' (43%), 'economic uncertainties' (37%), and an 'ageing workforce and skills shortages' (34% vs 31% in 2021).

As the global energy industry becomes more focused on technology and innovation, it's likely that we'll see an influx of talent from other industries like tech, retail, and manufacturing. Over the last 12 months, for example, a number of large tech companies have made redundancies, which means there will be more tech talent available for energy companies to attract. Of course, these skilled workers will be in high demand and companies will need to have streamlined hiring strategies in place to attract, interview, and secure candidates quickly.

In an industry with many opportunities for career progression, companies need to make the type of long-term investments that will retain experienced workers and encourage potential candidates to envision a future with the business. This means investing in the right people and having the right balance of opportunities across conventional and renewable energy.

Likewise, companies need to focus on building diverse and equitable teams, not only to boost performance but to increase their talent pools. As pressure to reduce carbon increases, diversity and inclusion are at risk of being de-prioritised. In turn, this could have an impact on the motivation for new people to enter the industry.

“**Renewables is the future of the energy industry. But without effective workforce planning, a just transition cannot happen. Achieving net zero depends on overcoming a significant challenge: the acute shortage of skilled and competent project professionals across all disciplines in all technologies. To match the pace of project delivery, we're going to need a constant stream of new, incoming talent from aligned sectors like conventional energy, aerospace, transport and maritime. Renewables is known as a diverse sector where everyone has the chance to thrive, and people from diverse backgrounds will need to be attracted. Across wind, solar, storage and hydrogen we expect up to 43 million jobs to be created globally by 2050. This will require an enormous, collaborative effort to attract, retain and champion talent. We have to get it right: the future of our planet depends on it.**”



TOM HOPKINSON,
CEO, TAYLOR HOPKINSON
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RISING TO THE CHALLENGES

To combat climate change and achieve a clean global energy industry, we need to address individual challenges along the way. And these challenges can only be overcome by having access to the right people.

Our survey reveals that the key causes of skills shortages are 'inadequate succession planning for knowledge transfer/skills retention' (38%), 'education and training' (31%), and a 'lack of motivational factors' (31%).

To attract skilled workers in an uncertain economy, companies need to look at diversifying their talent pool and hiring specialists from other sectors.

Likewise, to retain and motivate employees, leaders and managers need to provide workplace training and career advancement opportunities. Companies need to openly share information and talent, so that skilled workers can be used in a smart way, across different projects where their abilities will result in tangible progress.

In order to overcome skills shortages in 2023, energy companies plan to prioritise 'training and development of the existing workforce' (50%), offer 'better benefits and compensation packages' (29%), and offer 'flexible working' (28%). They also plan to 'change strategic priorities' (26%), and make 'changes to retention and recruiting practices' (24%).

“ It’s encouraging to see that most companies plan to focus on training and development over the coming year. Our industry is constantly evolving and energy workers need the knowledge and the skills to keep up with the latest developments, particularly in regard to technology. Likewise, ensuring salaries remain competitive will help attract skilled workers from other industries into the energy sector. As one of the highest paying industries already, salary increases will help companies hold on to experienced workers. The energy industry is set to see some significant changes in the coming years, and experienced talent will prove to be vital in navigating these developments and passing on their knowledge and skills to those new to the industry. ”



KARSTEN BORGMANN,
MANAGING DIRECTOR,
OILANDGASJOBSEARCH.COM
AND **ENERGYJOBSEARCH.COM**

ACTIONS SPEAK LOUDER THAN WORDS

Making a difference means being accountable and taking collective action. This chapter explores how to set the wheels in motion in response to political economic events, how conventional energy is evolving, and how we can make a positive impact in the world.



KEY INSIGHTS:

- More energy organisations are focused on investing in renewable energy (60%) than in reducing the costs of fossil fuels (27%)
- 38% of managers and leaders believe that there is still improvement to be made for renewables to take over conventional energy, and only 23% think renewable energy will overtake conventional energy within the next few years
- 78% of energy workers say their job makes a positive impact on the world

POLITICAL ECONOMIC AMBITIONS

The Sustainable Development Goals (SDGs) set by the United Nations in 2015 outlined the need for improved energy efficiency, universal access to modern energy services, and the need to adopt renewable energy by 2030. Eight years after the Paris Agreement was adopted by 196 parties (now 194) the pace of zero-carbon initiatives has gathered momentum on a global scale.

Our survey reveals that more energy organisations are focused on investing in renewable energy (60%) than in reducing the costs of fossil fuels (27%), which is an encouraging development.

This narrative was echoed in the pledges made at the COP27 event in Egypt, which saw major financial institutions commit to investing in net-zero transition efforts. Similarly, the US committed \$369 billion of government funding for climate-related spending through the Inflation Reduction Act, and the First Movers Coalition committed to buying \$12 billion worth of low-carbon technologies by 2030.

There were also significant developments at the COP15 event in Montreal, with governments signing a deal to halt the destruction of the earth's ecosystems and to put humanity on a path to living in harmony with nature by 2030.

Over the last 12 months, there have been many positive developments in the political economic structure of the energy industry. However, there is still work to be done to realise the energy transition by 2050. As we continue to move away from conventional energy towards cleaner energy, there will likely be geopolitical and economic impacts for countries that are heavily reliant on fossil fuel resources.

In recent times, a number of crises have caused countries to become over-reliant on conventional energy. Political conflicts and the increasing cost of living have seen energy prices rise and supply chains struggle to deliver. As a result, many countries have increased their use of conventional energy to account for deficits.

Moving forward, it's important that we set our sights on a realistic transition to renewables that minimises conventional energy, and makes use of untapped innovations like carbon capture storage technology.



A REALISTIC ENERGY TRANSITION

Although pressure is mounting to retire conventional energy assets, and despite many major oil companies diversifying into low-carbon energy, there are concerns within the industry that the transition may not be happening fast enough.

Our survey reveals that only 23% of managers and leaders think renewable energy will overtake conventional energy within the next few years, and 38% believe that there are still improvements to be made for renewables to take over conventional energy.

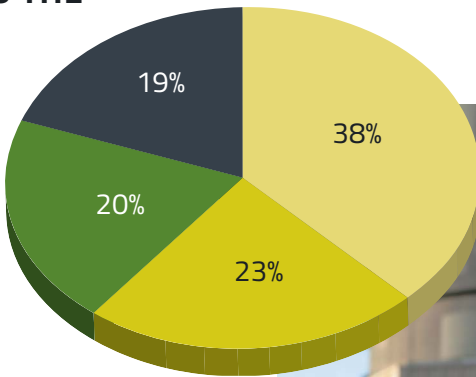
At the core of the energy transition is the need to ensure access to energy. Carbon reduction initiatives, therefore, need to be addressed as part of a sustainable development agenda. As much as new technologies will help us meet sustainability goals, fossil fuels are far from redundant in the current energy ecosystem.

There is a need for conventional energy to be further improved to ease the transition to renewables. For example, carbon capture and storage (CCS) technology, alongside managing methane emissions, can help reduce CO2, while fossil fuels remain a part of the global energy infrastructure. In short, there's a need to allow fossil fuels to become part of the journey toward transitioning to clean energy to ensure a buoyant global economy.

In regards to sustainability initiatives, over 28% of companies say they are planning to budget for sustainable projects in the future. Although this is encouraging, more companies need to budget for these initiatives now in order to show their commitment to change. When it comes to the energy transition, actions speak louder than words. Likewise, 28% have research and development budgets for sustainable projects, and 24% have a global budget for projects.

ENERGY LEADERS BELIEVE THAT THE FOLLOWING STATEMENTS ARE MOST RELEVANT TO THE ENERGY INDUSTRY

- There is still improvement to be made for renewables to take over conventional energy
- renewables will take over conventional energy within the next few years
- An energy mix including renewables, nuclear and conventional energy is the only option to power the world
- It's unrealistic to imagine a world without conventional energy for the next few decades



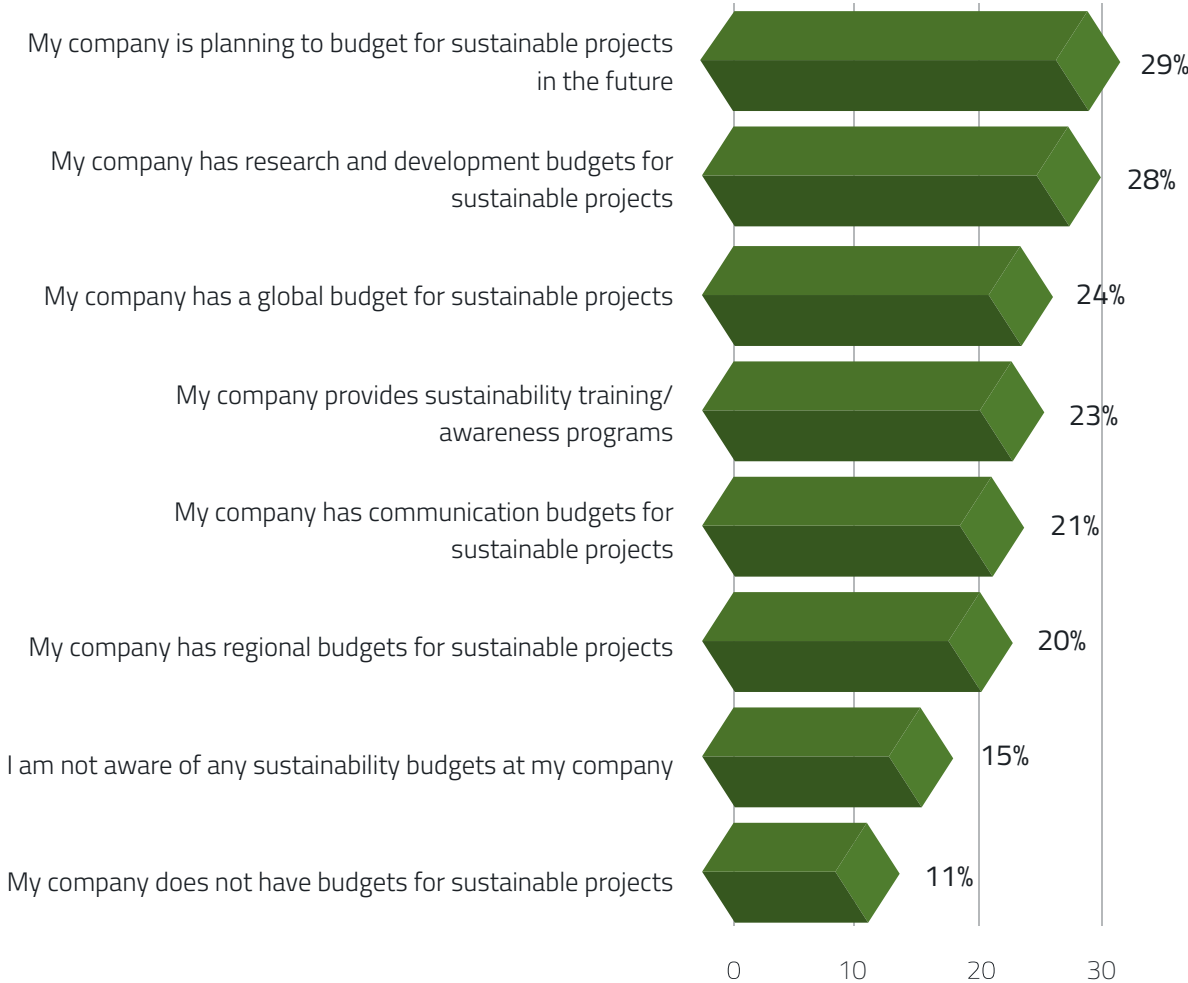
“ As technology advances, new innovations in the energy sector are powering more efficient and cleaner solutions, resulting in large-scale investments and enabling new projects to commence. These projects, driven by new technology, will become increasingly important in powering the world. A successful future relies heavily on a mix of traditional and new energy sources. Conventional energy projects, such as cost-effective storage technology, are enabling the energy transition to succeed. Natural gas will play a key role during the transition and beyond, replacing more polluting products and improving air quality while limiting carbon dioxide emissions.

The energy sector is facing a major challenge in securing talent with the knowledge, experience, ambition and drive to push the limits of technology. As the world changes, the people behind the technology of yesterday, today and tomorrow will be crucial for the future of the sector. This presents an exciting and promising future for specialists in the energy industry. ”



STEPHEN POLLOCK,
GLOBAL DRIVER ENERGY
AND COUNTRY MANAGER,
BRUNEL

THE FOLLOWING STATEMENTS ARE TRUE ABOUT COMPANIES’ SUSTAINABILITY INITIATIVES:*



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

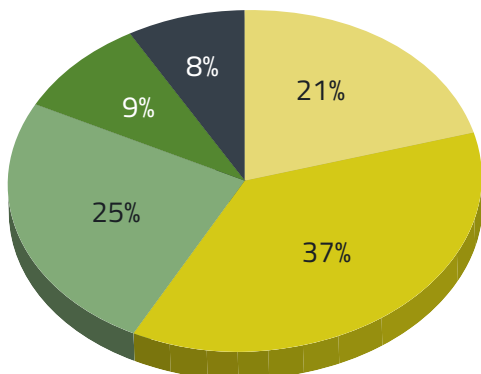
TAKING COLLECTIVE ACTION FOR THE FUTURE

Businesses can't become carbon neutral overnight. However, with a clearly-defined carbon reduction strategy, companies can prioritise which emissions are having the greatest impact and address those first. Change takes time, and it's heartening to learn that approximately half of both conventional energy and renewable energy workers believe that their job makes a positive impact throughout the world. Indeed, both sectors are creating jobs, advancing technology, and encouraging innovation, all of which are helping combat climate change. In short, the energy industry is key to creating a better world.

It comes as no surprise then, that 91% of energy workers are concerned about climate change. After all, it's these people that are driving the change toward a greener future.

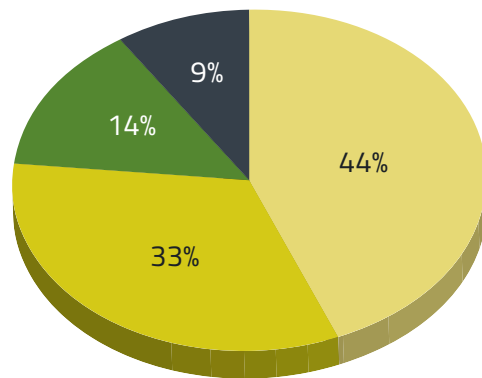
WHEN ASKED HOW CONFIDENT THEY WERE IN FINDING NEW EMPLOYMENT IN THE ENERGY INDUSTRY, WORKERS SAID:

- Extremely
- Very
- Moderately
- Somewhat
- Not at all



WHEN ASKED HOW CONCERNED THEY WERE ABOUT CLIMATE CHANGE, ENERGY WORKERS SAID:

- Very
- Moderately
- Somewhat
- Not at all



With more than 9 in 10 energy workers expressing concern for climate change, it's important to ensure that the attitudes of energy companies, governments, and other organisations also align with those of energy workers in order for real action to be taken.

Looking to the future, 83% of energy workers say they are confident in finding work in the industry, compared to 72% in 2021. This positive outlook reinforces that the energy industry is currently a candidate-driven market, and so recruiters and employers need to ensure they're providing the type of salaries, benefits, and working cultures that align with the values of energy workers.

POWERING POSITIVE CHANGE

Despite the challenges facing the global energy industry, there are many positive developments and opportunities on the horizon.

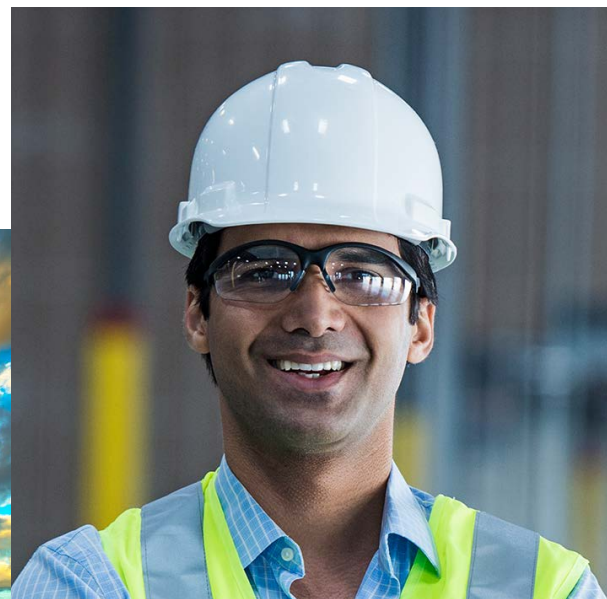
Natural gas projects in Europe have recently become fully operational, increasing the security of Europe's energy supply.

Likewise, the largest battery storage system in Europe also went live in the UK at the end of November. The project can store enough energy to power around 300,000 homes for two hours using a large-scale rechargeable lithium-ion battery.

A mega-refinery costing an estimated \$19bn USD is set to reach full production in West Africa in 2023. This will be the largest single-train refinery in the world, enabling the country to significantly reduce its import bill for refined products.

Advancing technological trends within the metals and mining sector, such as autonomous vehicles, artificial intelligence, and digitalisation/big data, have had a positive impact on operational safety, efficiencies, and ESG commitments. As mining companies strive to improve their sustainability practices, they also help to power the energy transition by providing the commodities required to build cleaner energy sources.

COP27, which was held in Egypt this year, saw countries recommit to the 1.5°C degree limit. A number of countries also pledged to raise capital for Indonesia, under a partnership to help the country decarbonise by 2050.





At the COP15 event, held in Montreal, many more countries agreed to sign the Global Methane Pledge, which aims to cut methane emissions by 30% by 2030. The agreement also aims to restore 30% of degraded land and water throughout the decade. The deal marks the highest profile goal that has been committed to at the convention to date.

Last year, the USA passed a bill which the White House projects will reduce U.S. greenhouse gas emissions by 40% by 2030. The legislation marks a major investment in clean energy for the USA.

The renewables sub-sector looks to remain strong in 2023 as more solar and wind energy projects become operational. However, we expect the commodity price boom to continue to divert some investment toward conventional energy projects. Increasing interest rates may restrict renewables investments somewhat, but will ensure skilled workers continue to join the energy industry from other sectors, bringing their expertise and closing skills gaps.

We expect to see the oil and gas sector in particular, embracing its challenges and focusing on attracting young workers. This will mean a continued increase in salaries and the implementation of more training programmes. Likewise, flexible working opportunities will continue to attract those looking for a positive work-life balance.

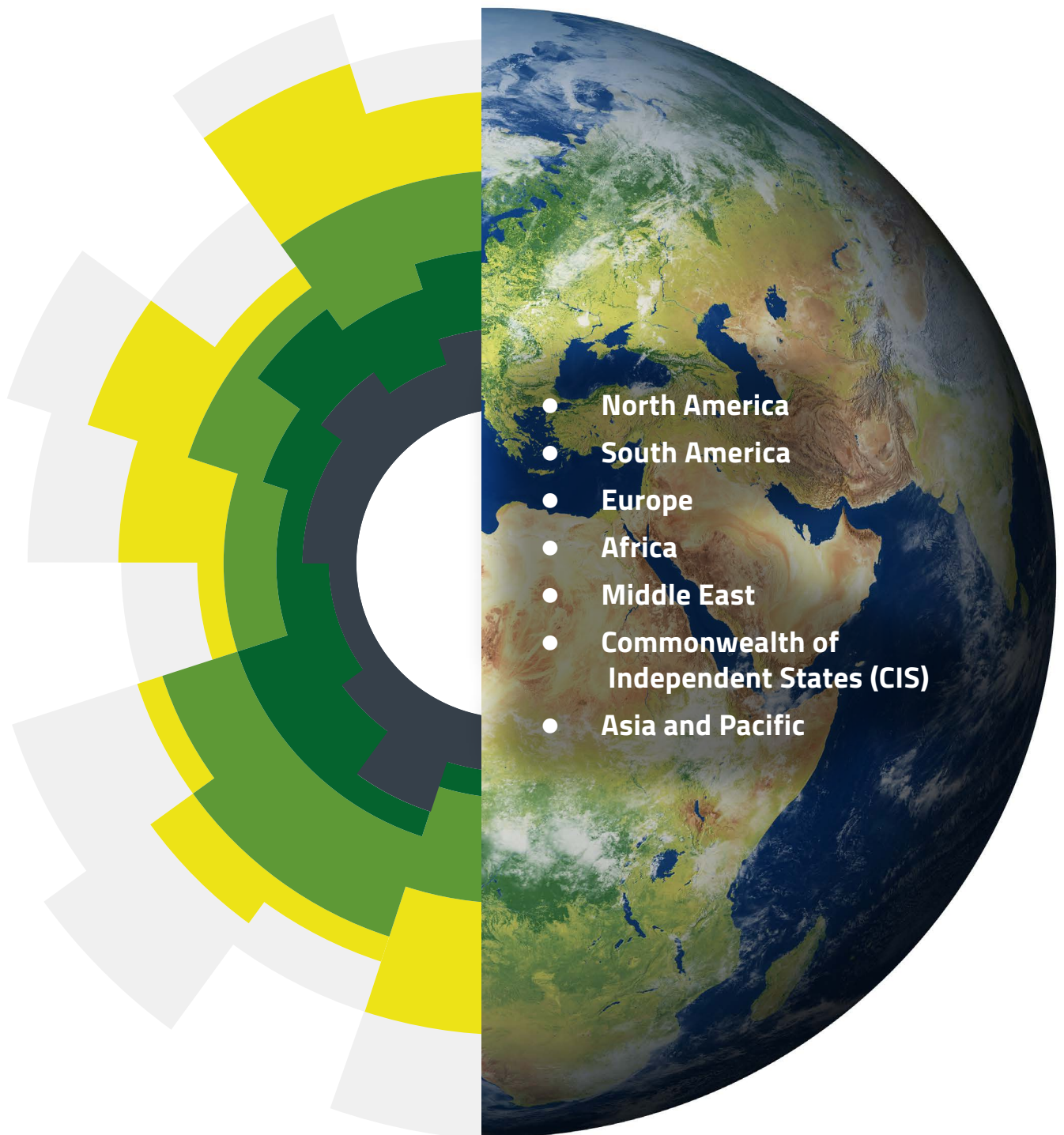
As the energy industry continues to transition to clean energy, workforce learning and development will be critical to attracting and retaining talent. Companies will likely seek expertise outside of the energy industry, and access untapped talent pools.

Given the increased use of conventional energy over the last 12 months, companies will also embrace the challenge of demonstrating their commitment to innovation and climate change. By fostering a positive culture and repositioning employer brands to align with the environmental narrative, companies can better engage with the values of younger workers and inspire the next generation to power change for a positive future.

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

REGIONAL INSIGHTS

Regional insights demonstrate the core findings of the survey per region.



NORTH AMERICA

Following a period of uncertainty for the North American power sector, the region is succeeding in aligning its pandemic recovery efforts with its climate targets. A number of new initiatives are now underway with a focus on upstream emissions, energy efficiencies in buildings, clean energy infrastructure, and zero-emission vehicles. Despite recurring supply chain issues and rising energy prices slowing energy growth in the region, North America is set to meet its net zero targets by 2050.

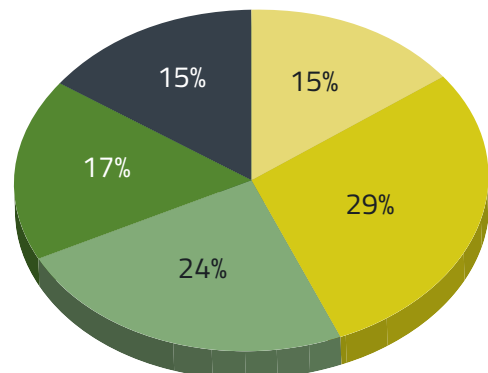
Following a period of growth over the last year, renewable energy in North America looks to be slowing, due to inflation and trade policy uncertainty. However, as a global leader in solar PV, the sector's growth will likely accelerate towards the end of 2023 due to increasing demand for clean energy.

SNAPSHOT

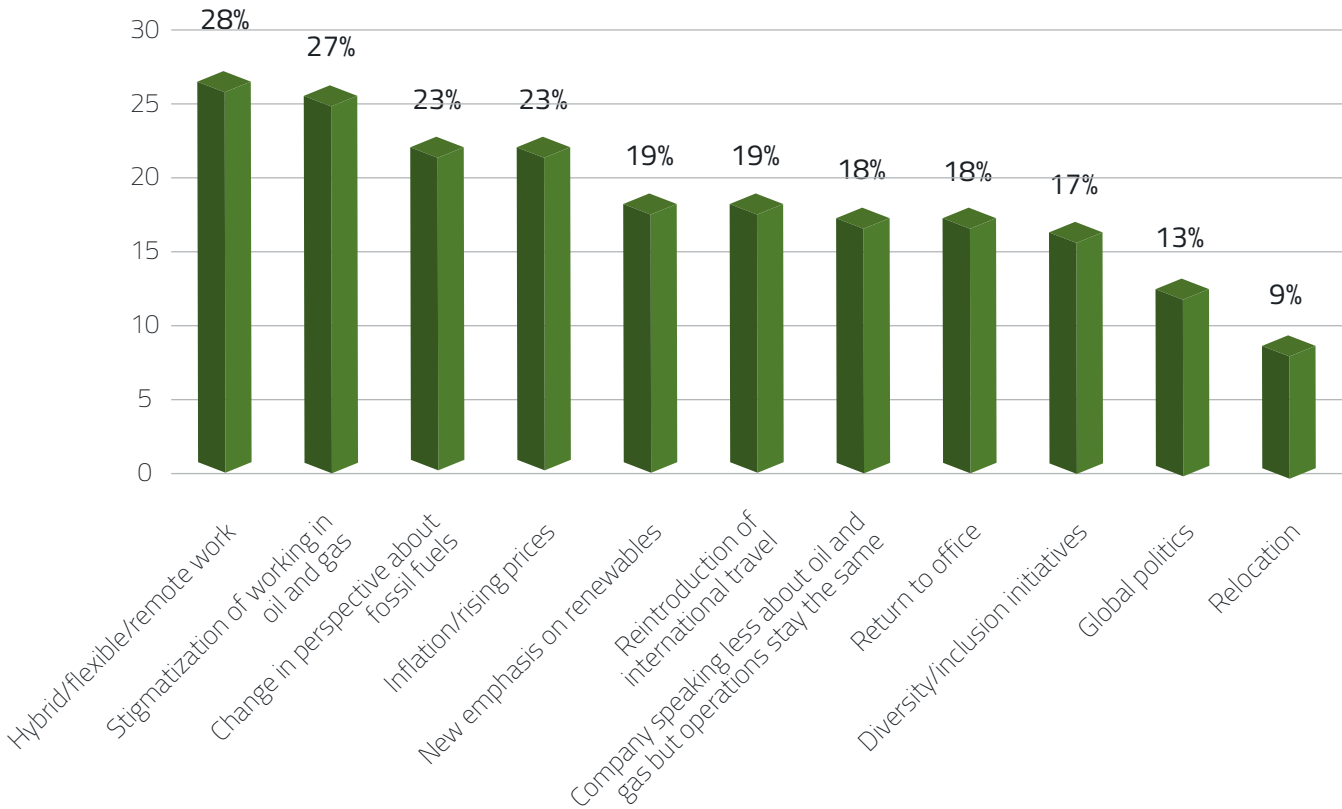
- When asked about the reasons that would make them seek new employment, energy workers in North America cited 'rising inflation' as the top answer (same percentage globally). The second most common answer was 'sustainable development/climate change' (34% vs 26% globally), followed by a 'global pandemic' (23%) whereas the reputation of the industry came third in global responses.
- 87% of energy workers in North America are concerned about climate change versus 91% globally.
- 65% of managers and leaders surveyed in North America expect continued energy shortages in 2023 (compared to 56% globally).

HOW CONFIDENT ARE YOU ABOUT FINDING NEW EMPLOYMENT IN THE ENERGY INDUSTRY?

- Extremely confident
- Somewhat confident
- Very confident
- Not at all confident
- Moderately confident



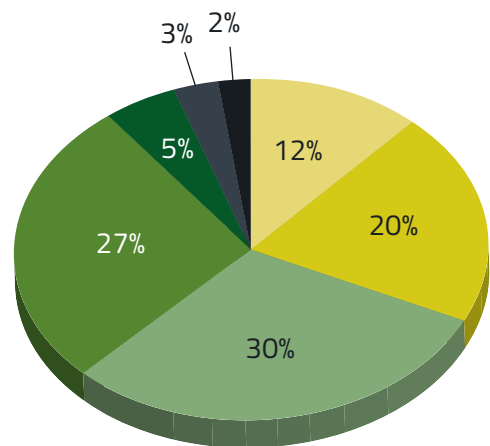
WHAT HAVE BEEN THE BIGGEST CHANGES TO YOUR JOB IN THE PAST 12 MONTHS?*



WHICH BEST DESCRIBES YOUR COMPENSATION COMPARED TO 12 MONTHS AGO?

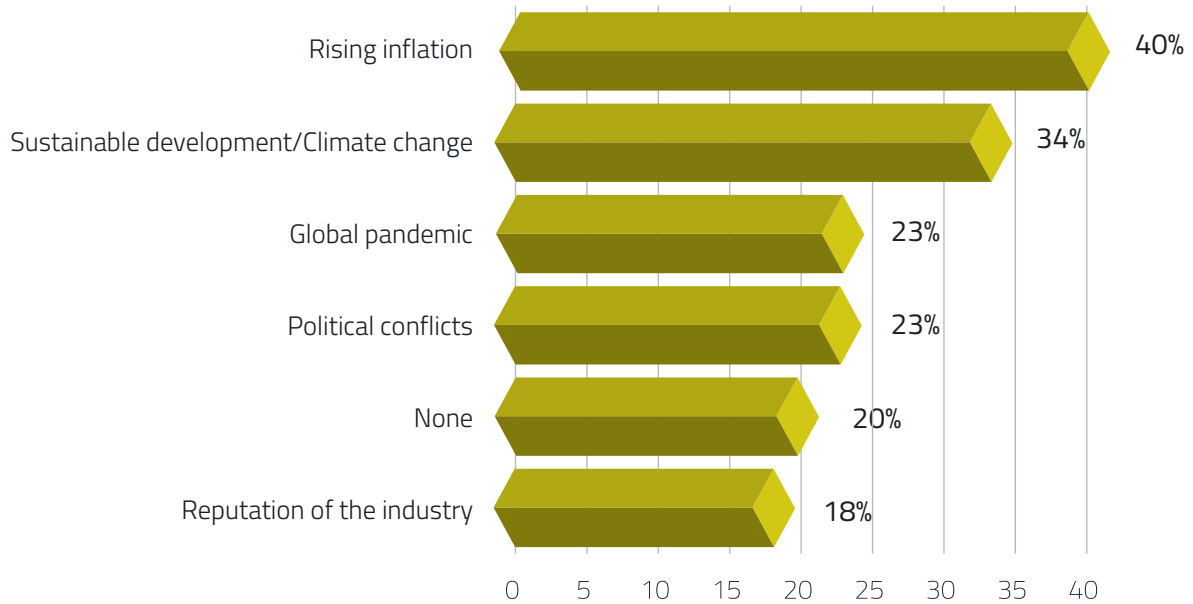
Salary has

- Increased +10%
- Increased 6-10%
- Increased 1-5%
- Stayed the same
- Decreased 1-5%
- Decreased 6-10%
- Decreased +10%

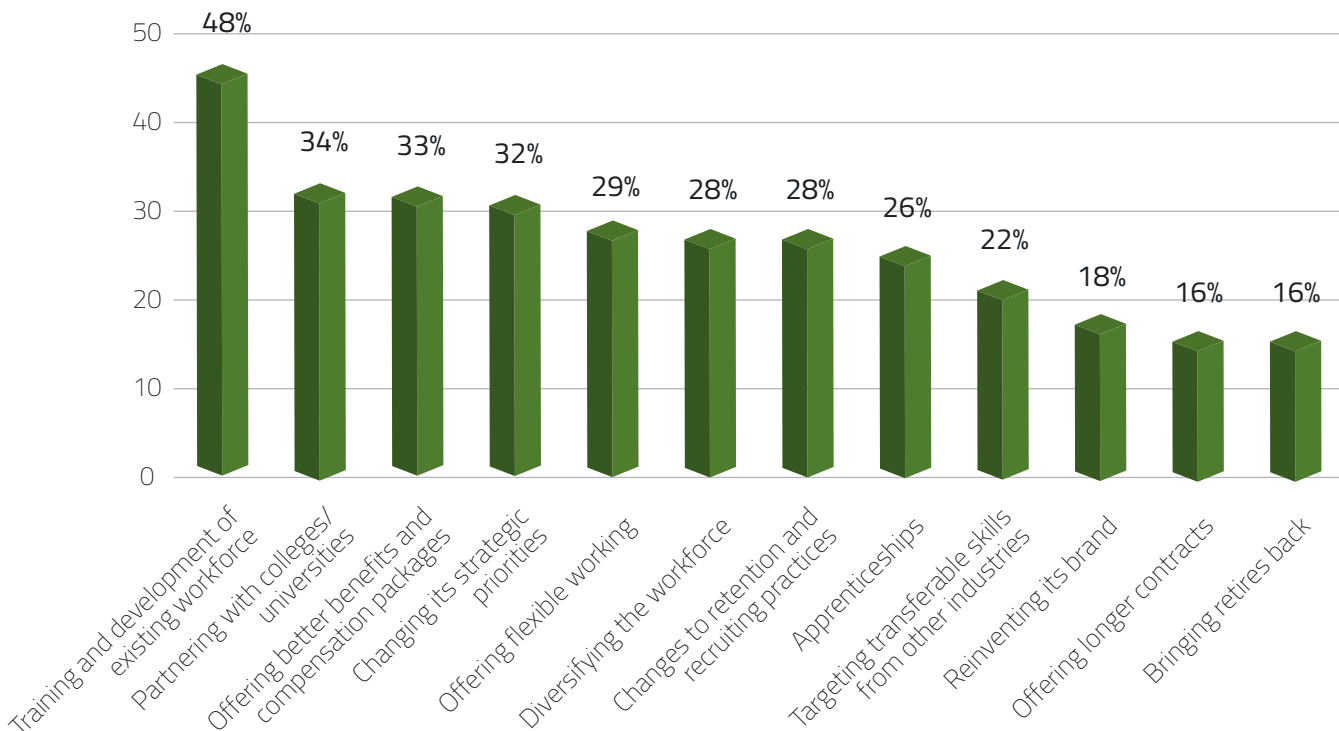


*Graphs highlighting results from a multi select question. As a result, the total response percentage exceeds 100%.

WOULD ANY OF THE FOLLOWING MAKE YOU SEEK NEW EMPLOYMENT?*

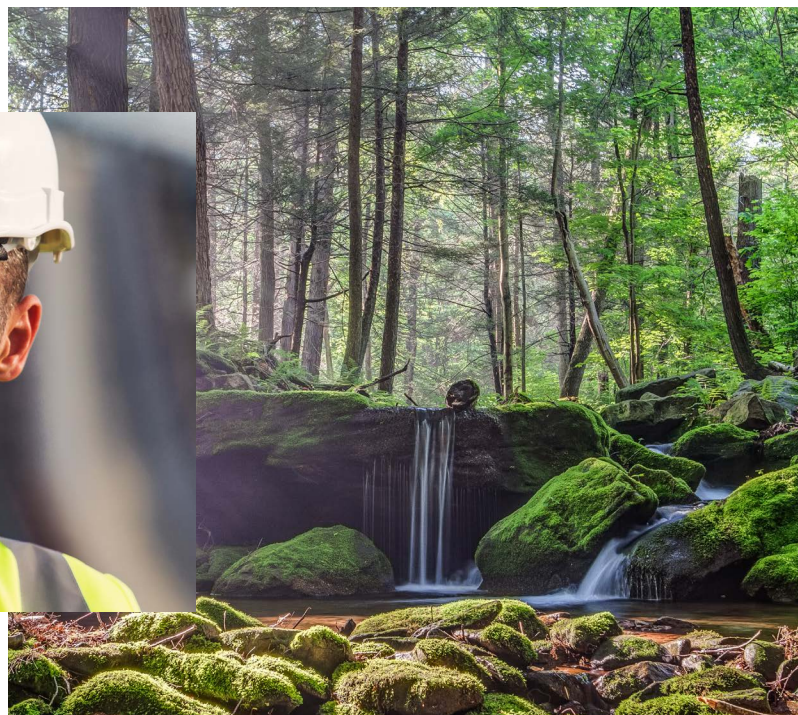
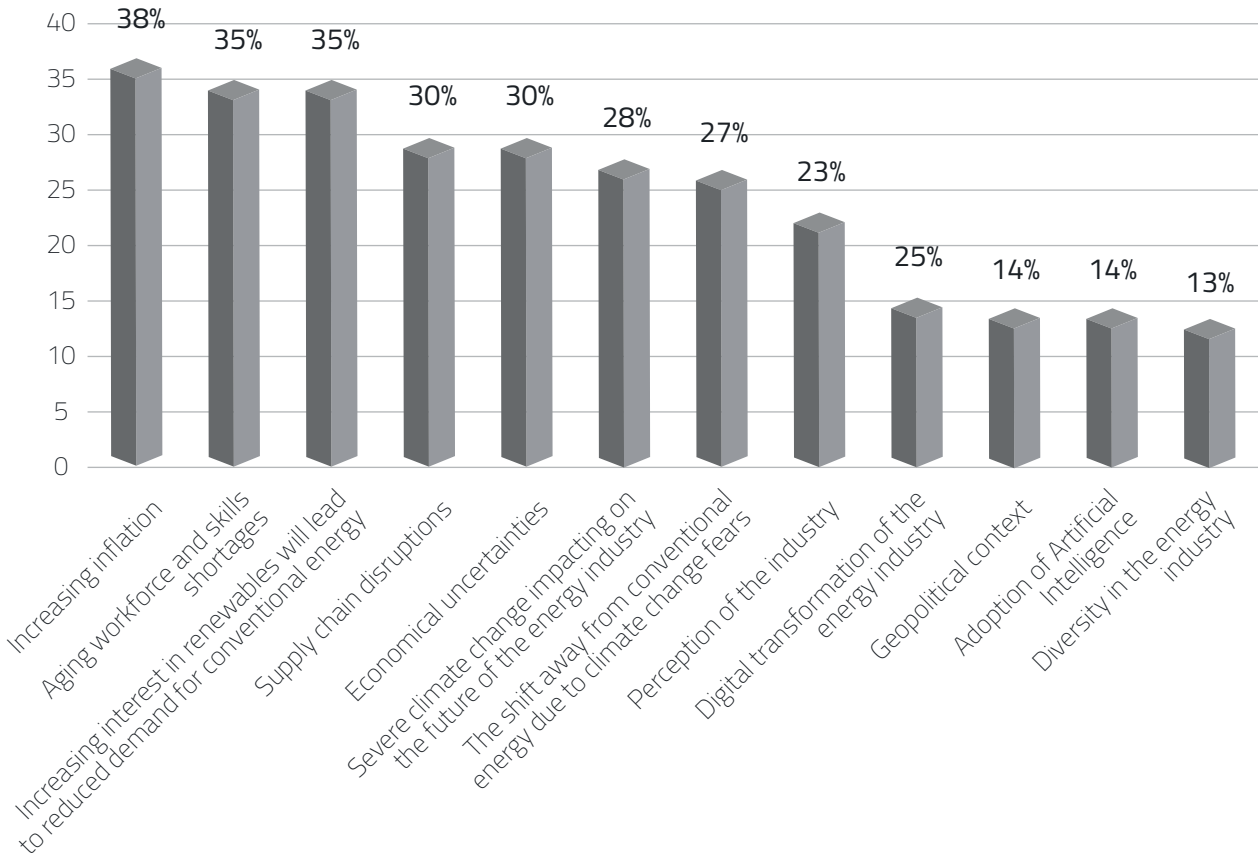


WHAT IS YOUR COMPANY DOING TO OVERCOME THE SKILLS GAP?*



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THE TOP CHALLENGES FACING MANAGERS AND LEADERS OVER THE NEXT FIVE YEARS*



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SOUTH AMERICA

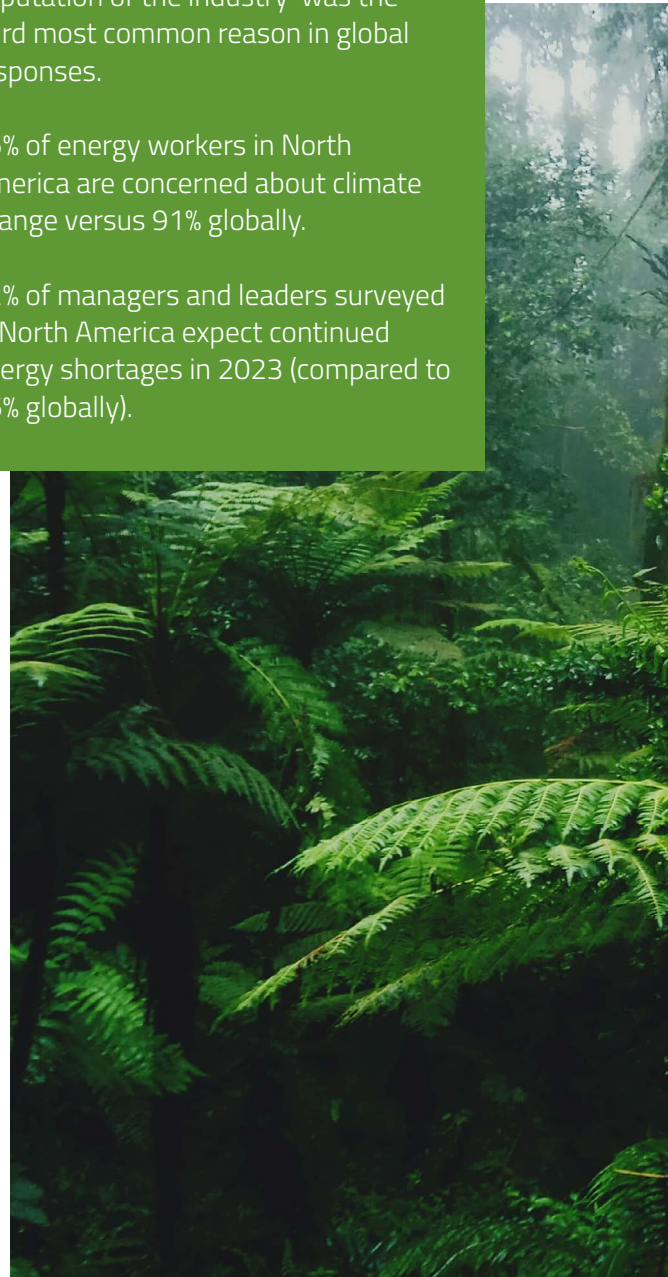
Climate change continues to have a negative impact on South America. Drought, extreme rainfall, and heatwaves are the main causes of supply chain issues. In spite of this, the region's oil and gas production continues to increase with several new contracts being secured in 2022. The political economic situation remains unpredictable with political swings having the potential to impact investment in energy projects.

South America continues to be one of the leading renewable energy-producing regions in the world with several projects becoming operational in 2022. As renewable technology becomes more cost-competitive, the region's solar market looks to grow significantly over the next 12 months, particularly in Mexico. Likewise, lower technology costs will likely see offshore wind become most competitive in Brazil and Colombia, with green hydrogen production having the most potential for offshore projects in the future.

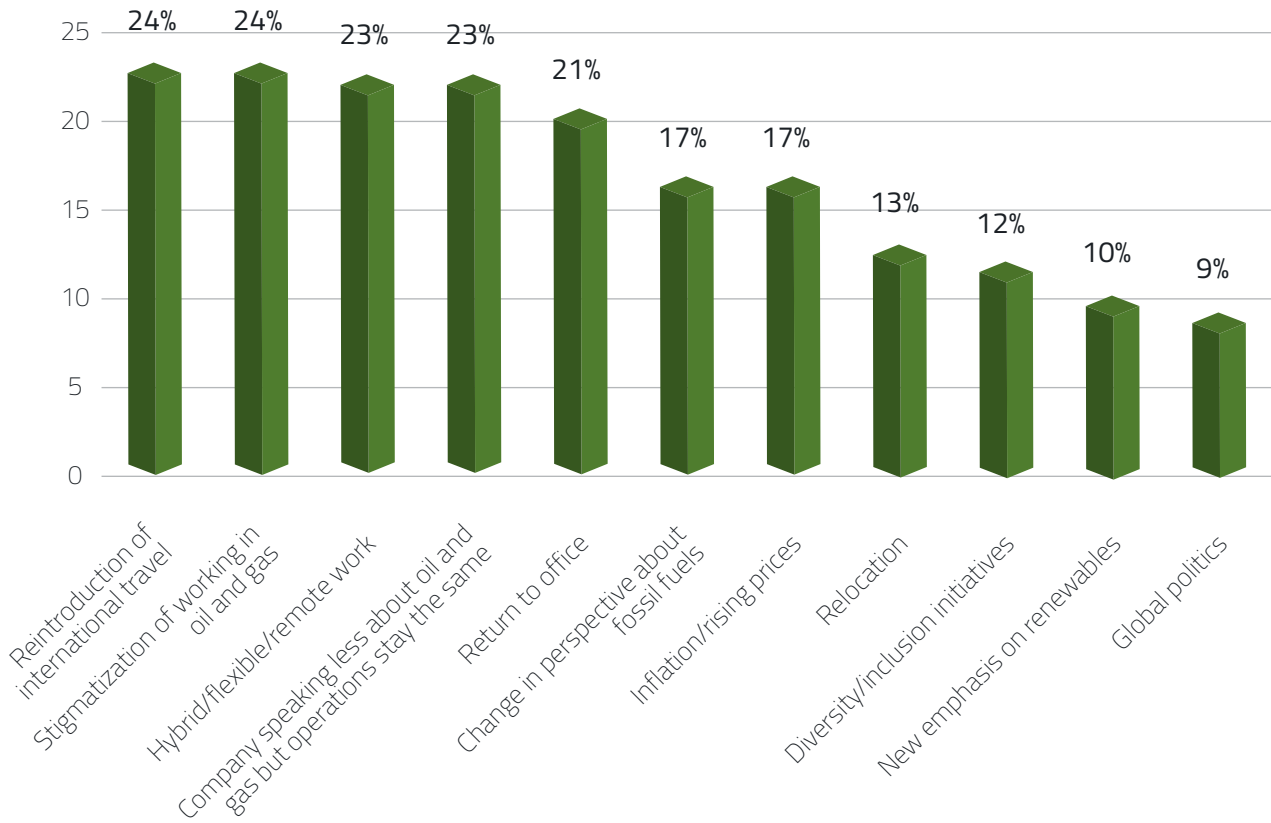
With one of the world's largest reserves of metals, South America's mining sector continues to attract investors. The government aims to establish a well-regulated sector to accelerate socio-economic development, while minimising environmental impacts. However, conflicts over governance and environmental opposition to mining projects makes future demand uncertain.

SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in South America cited 'sustainable development/climate change' as the top answer (36%). 'Rising inflation', the most common answer in other regions came second with 31%, followed by 'political conflicts' (25%) whereas the 'reputation of the industry' was the third most common reason in global responses.
- 95% of energy workers in North America are concerned about climate change versus 91% globally.
- 62% of managers and leaders surveyed in North America expect continued energy shortages in 2023 (compared to 56% globally).



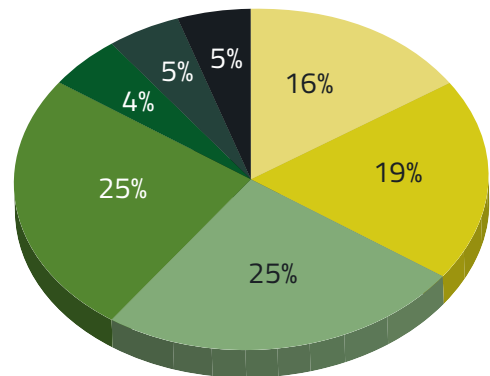
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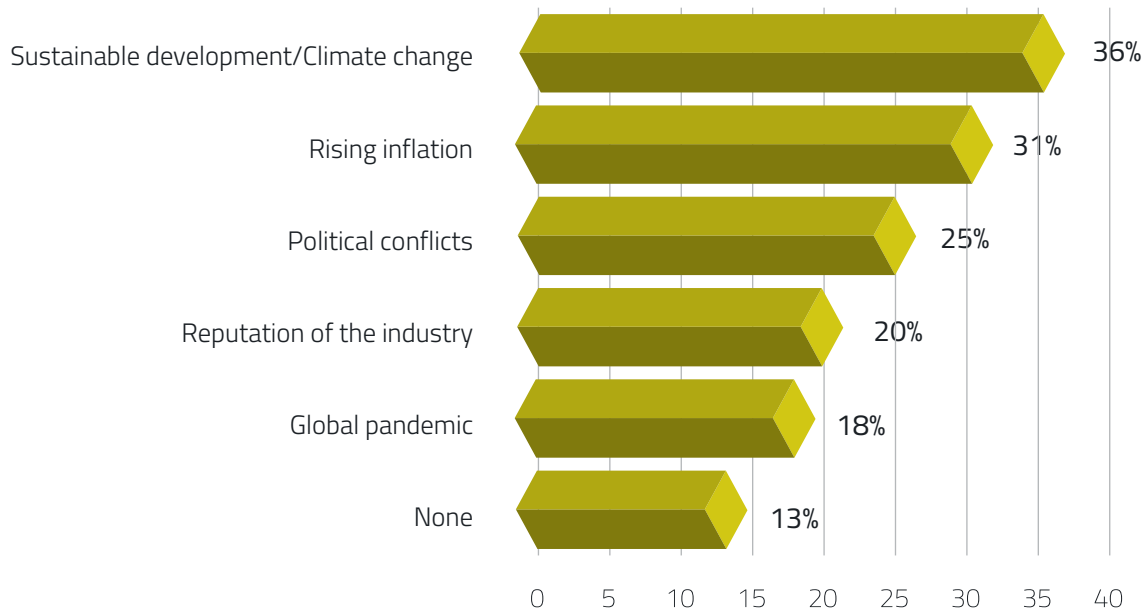
Salary has

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- Decreased 6-10%
- Decreased +10%

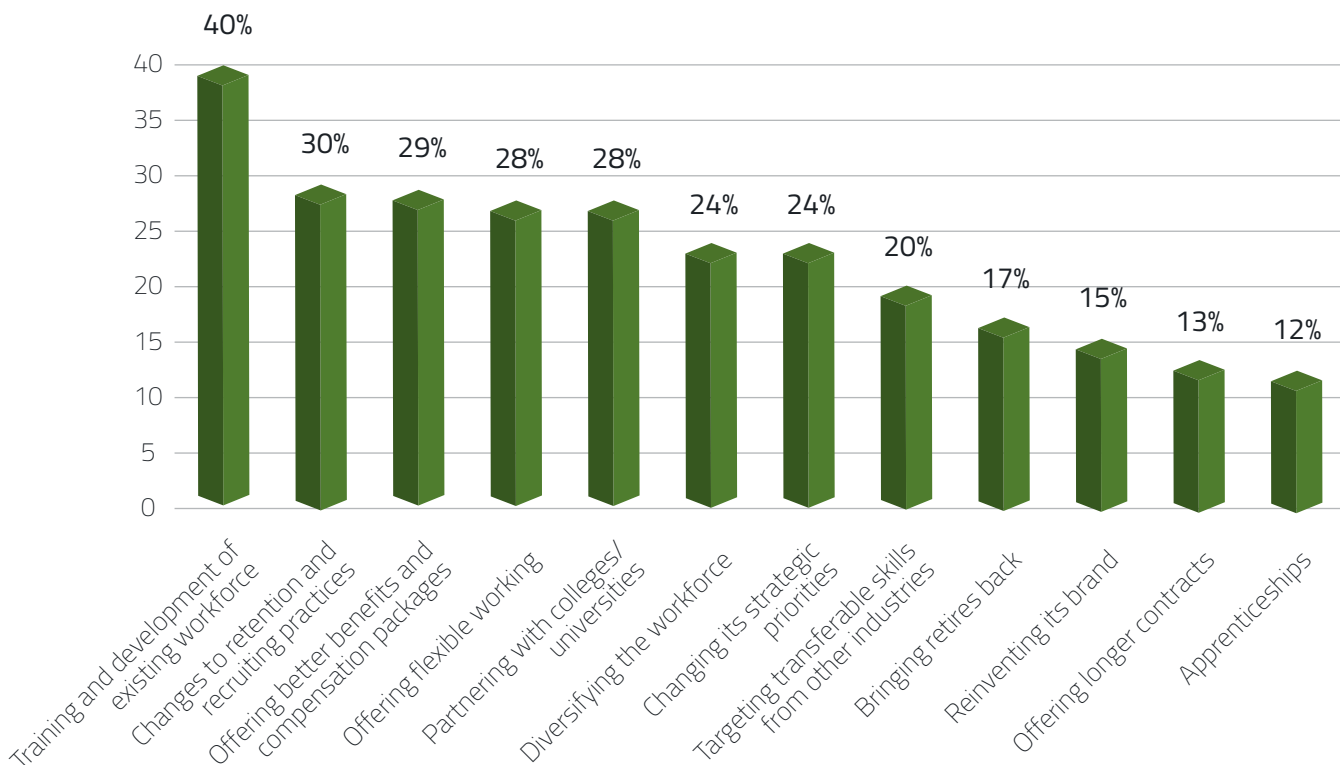


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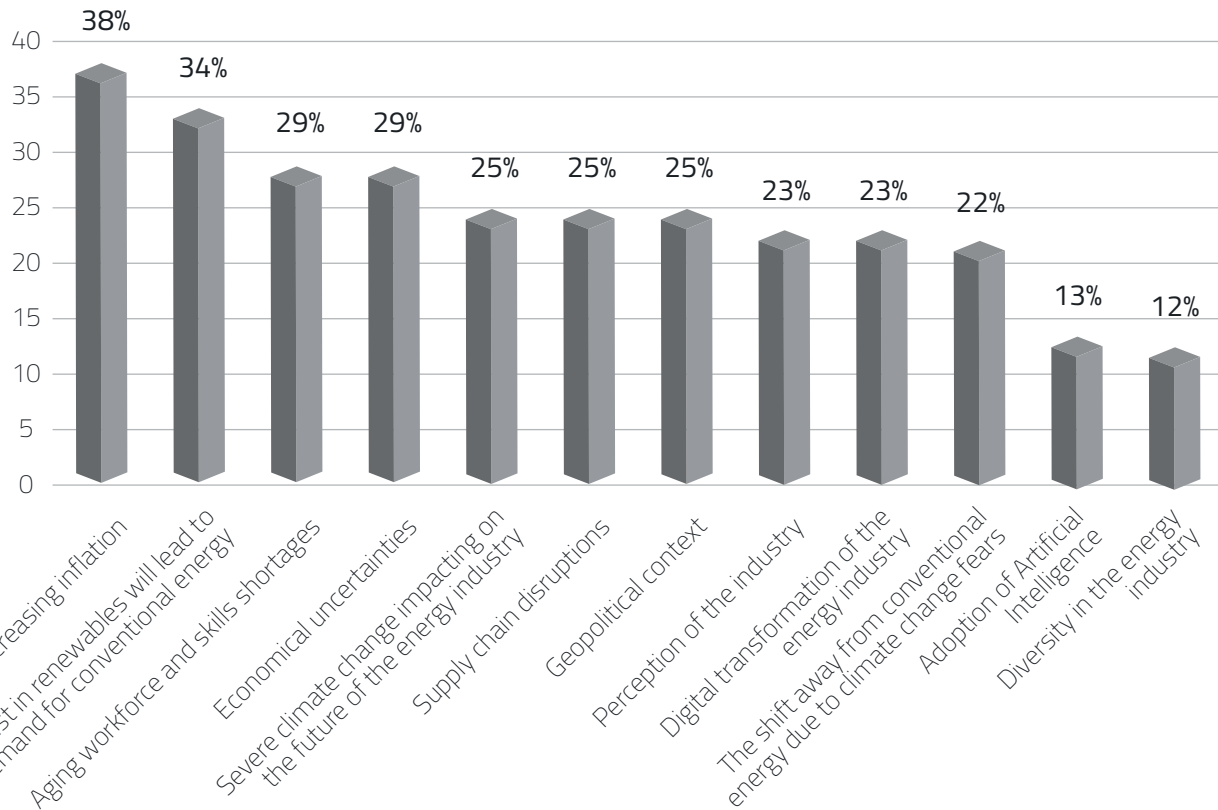


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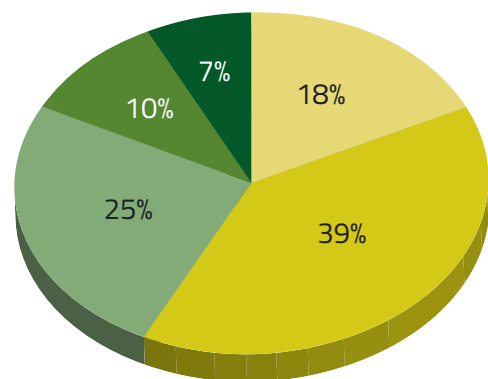
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THE TOP CHALLENGES FACING MANAGERS AND LEADERS OVER THE NEXT FIVE YEARS*



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- Extremely confident
- Very confident
- Moderately confident
- Somewhat confident
- Not at all confident



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EUROPE

In response to political conflicts, the EU launched its REPowerEU package, focused on decarbonisation and reducing dependence on energy imports from outside of Europe. Scaling up renewables projects is important for the region to achieve energy security. It's expected that more solar PV and wind projects will be realised in 2023 and that investment in cleantech will be encouraged to ensure Europe remains a global leader in renewable energy.

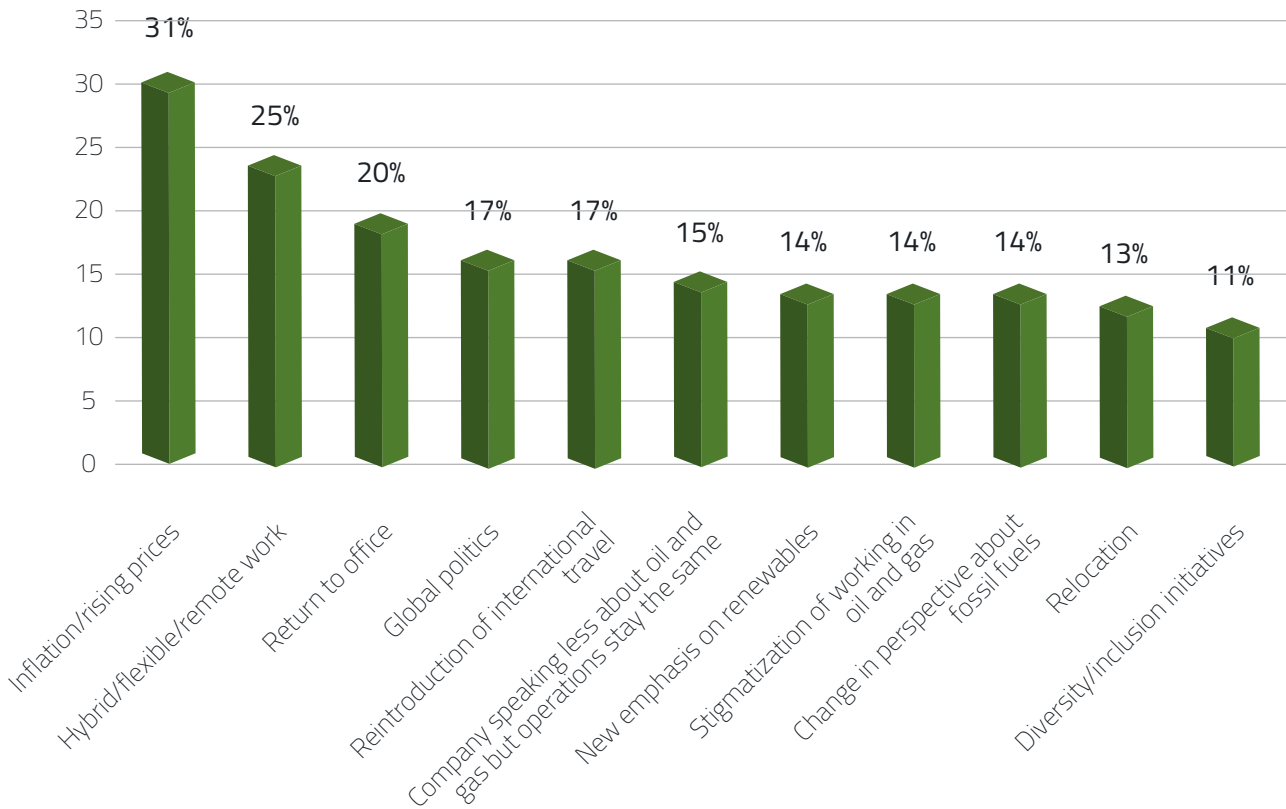
After being impacted by supply chain issues, the European mining sector has made changes to its business and operating models. Costs and productivity have been impacted due to inflation, and these changes will enable miners to reposition for the future. Companies are also looking to strategise and unlock value to remain competitive on a global scale.

SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in Europe cited 'rising inflation' as the top answer (35% compared to 40% globally). The second most common answer was 'sustainable development/climate change' (27% vs 26% globally), followed by 'none' (23%) showing that workers in Europe are less likely to be impacted by external factors in their professional life than workers in other regions .
- 92% of energy workers in Europe are concerned about climate change versus 91% globally.
- 59% of managers and leaders surveyed in Europe expect continued energy shortages in 2023 (compared to 56% globally).



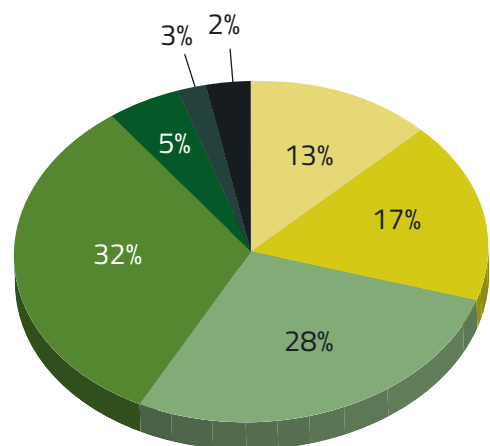
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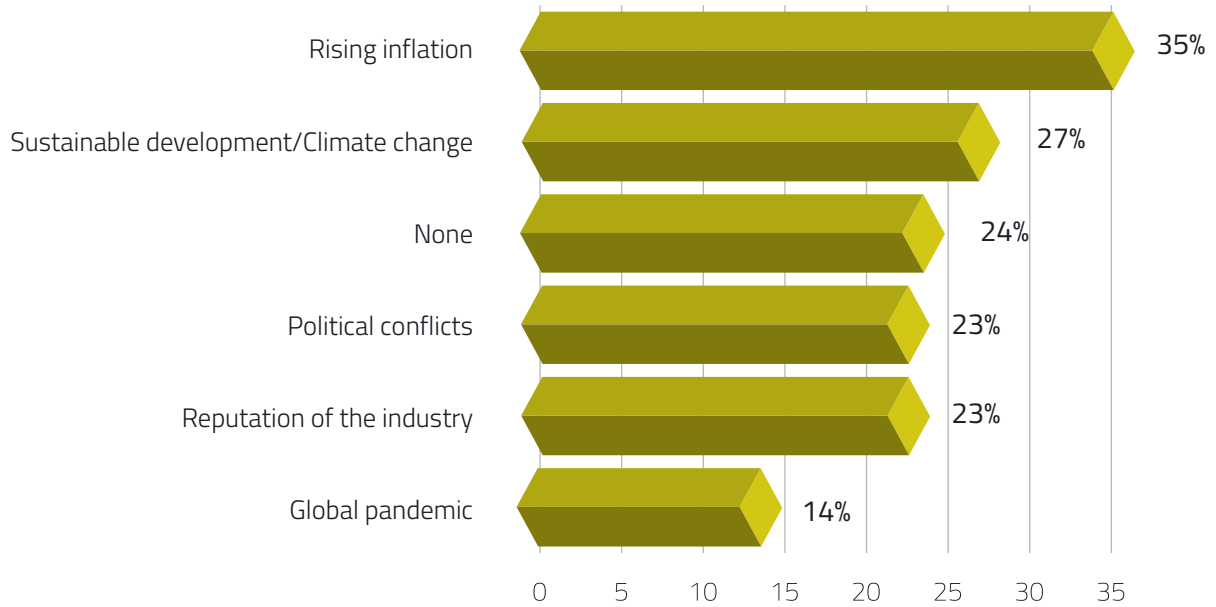
Salary has

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- Decreased +10%

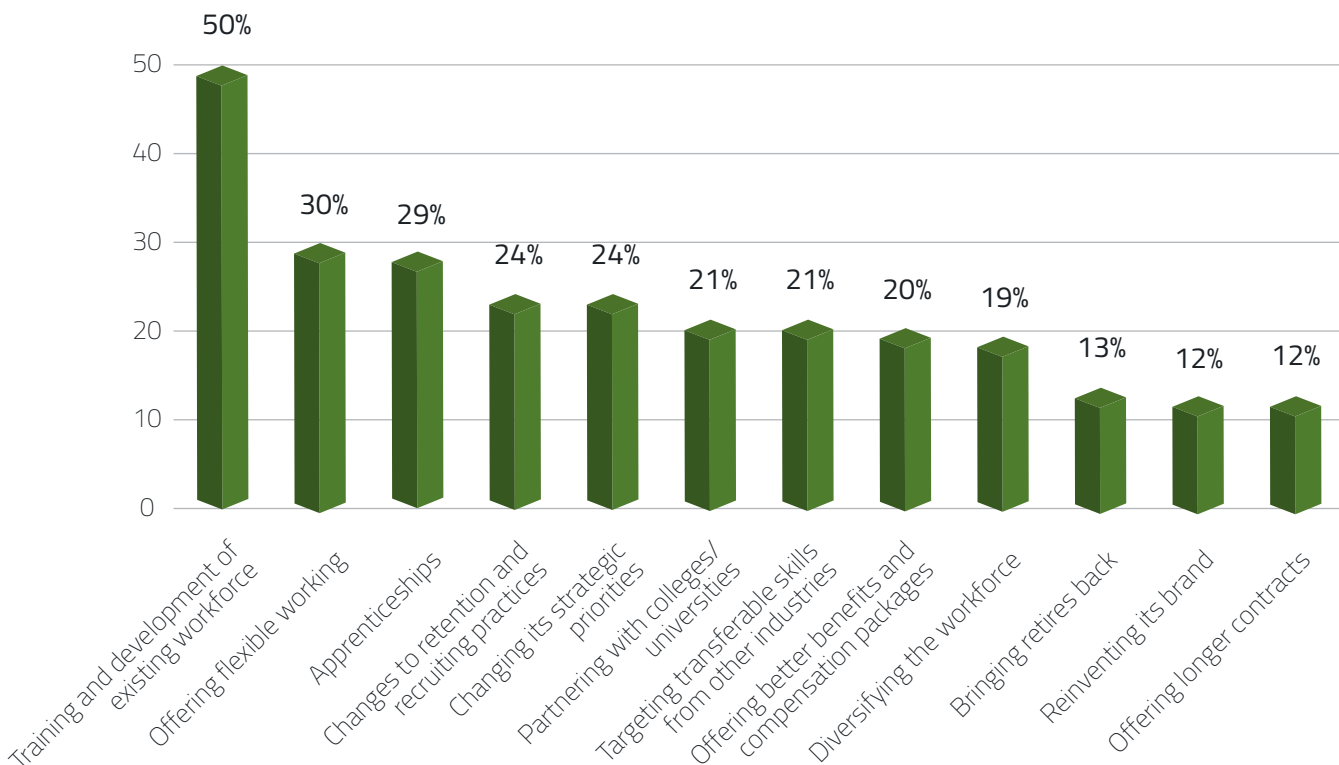


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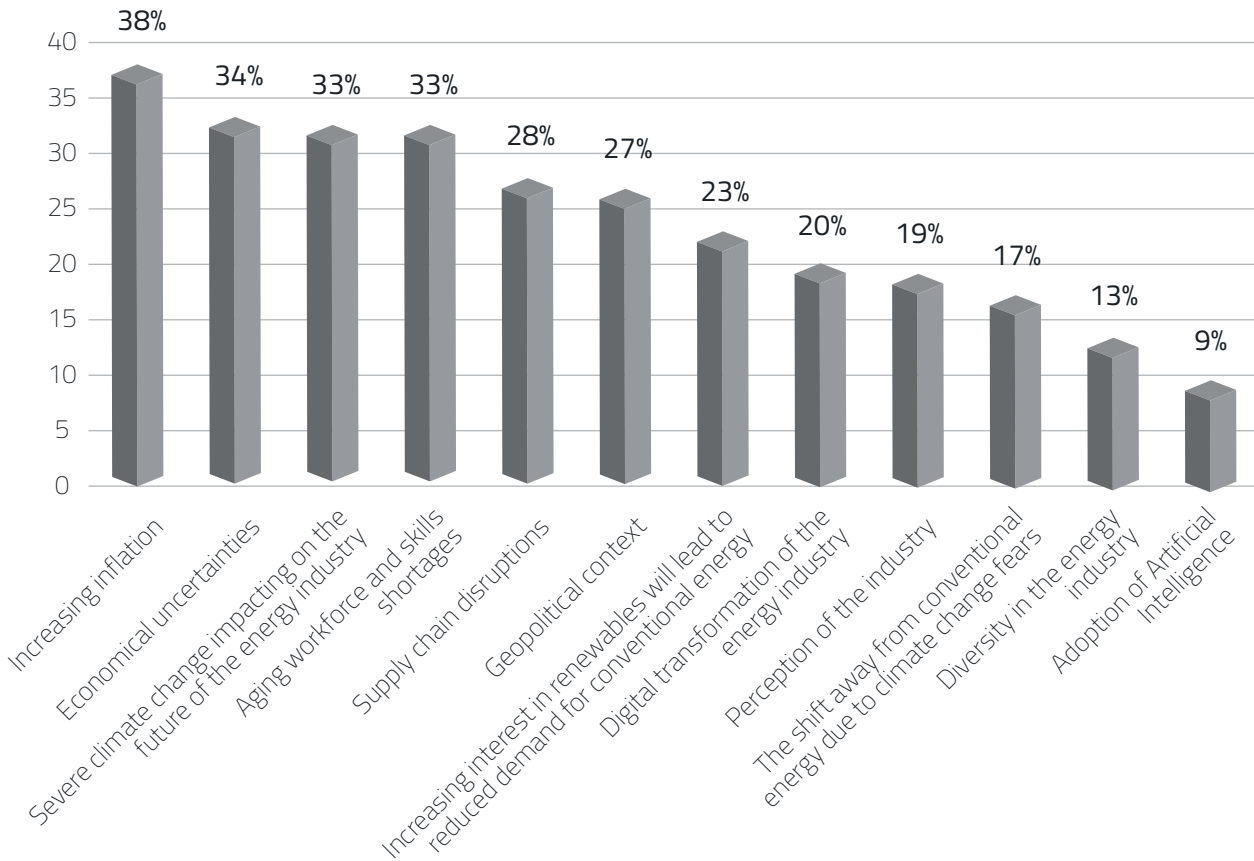


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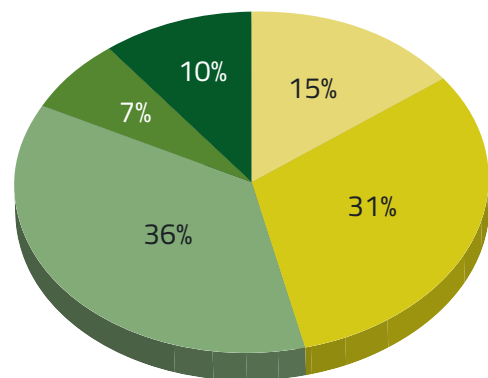
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- Moderately confident
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- Not at all confident



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AFRICA

Climate change continues to pose a serious threat to African countries. Water stress, reduced food production, and extreme weather is fuelling mass migration, lower economic growth, and creating regional instability. Affordable energy is the immediate priority for all Africans. On a positive note, most of the largest carbon emitting countries in the region have committed to achieving Net Zero by 2050.

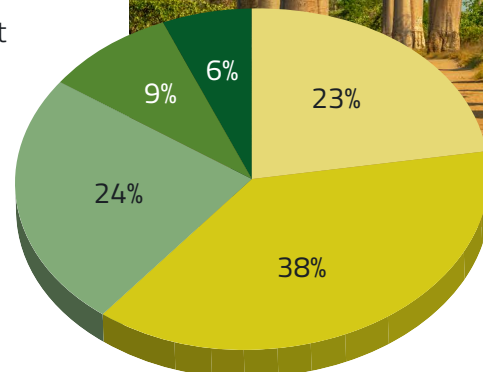
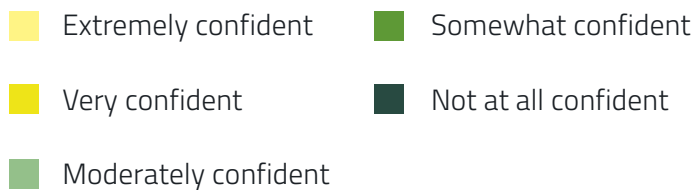
As Africa's population rises, renewable energy will be key to the continent's socio-economic development and securing affordable energy. The region's renewables sector looks set to continue its growth in solar and wind energy, with potential for geothermal and bioenergy projects. However, in order to reach Net Zero by mid-century, Africa needs to secure more clean energy investments.

With extractable reserves of metals and minerals, planned investments in Africa's mining sector will see it grow over the coming years.

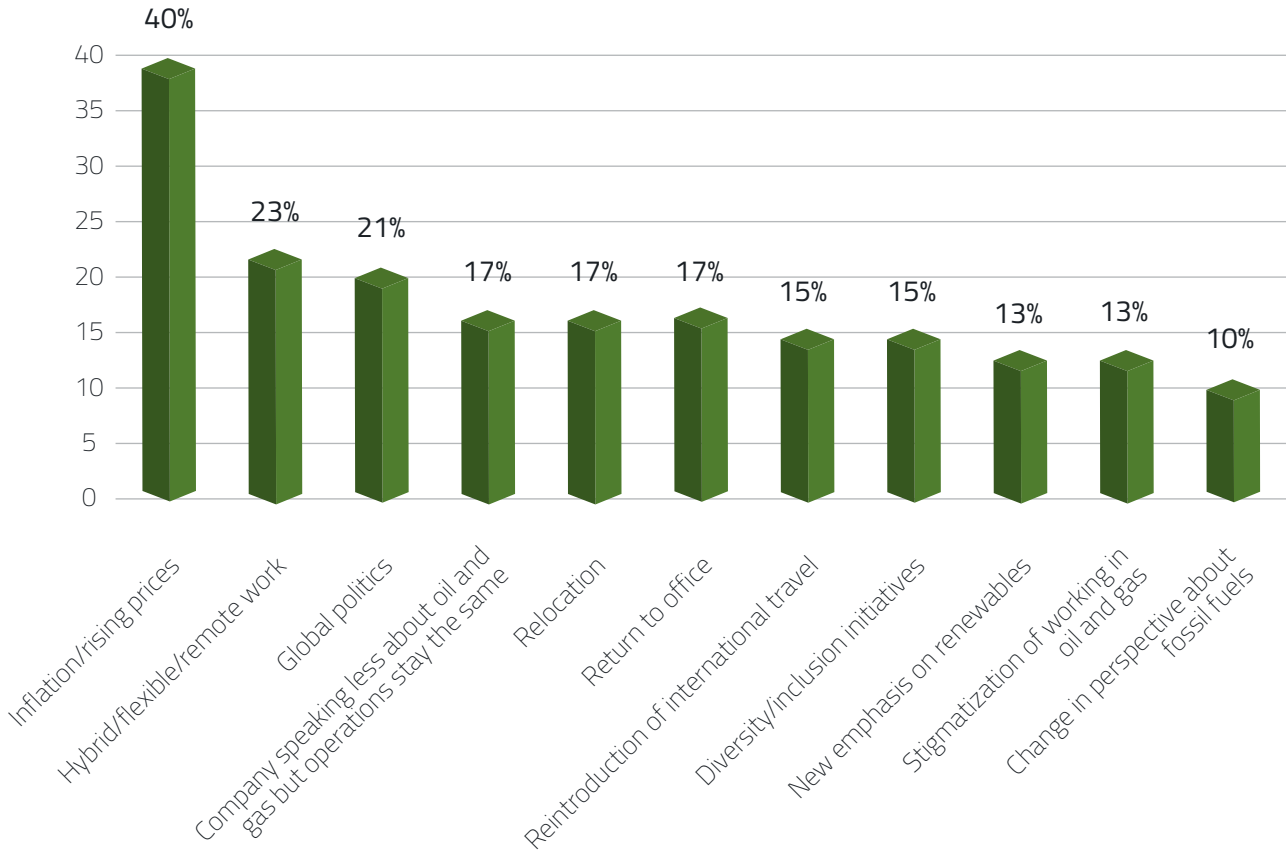
SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in Africa cited 'rising inflation' as the top answer (49% compared to 40% globally). The second most common answer was 'reputation of the industry' (34% vs 24% globally), followed by 'political conflicts' (30% compared to 22% globally).
- 94% of energy workers in Africa are concerned about climate change versus 91% globally.
- 51% of managers and leaders surveyed in Africa expect continued energy shortages in 2023 (compared to 56% globally).

HOW CONFIDENT ARE YOU ABOUT FINDING NEW EMPLOYMENT IN THE ENERGY INDUSTRY?



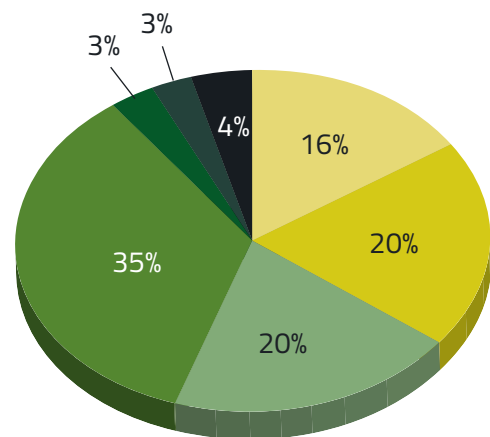
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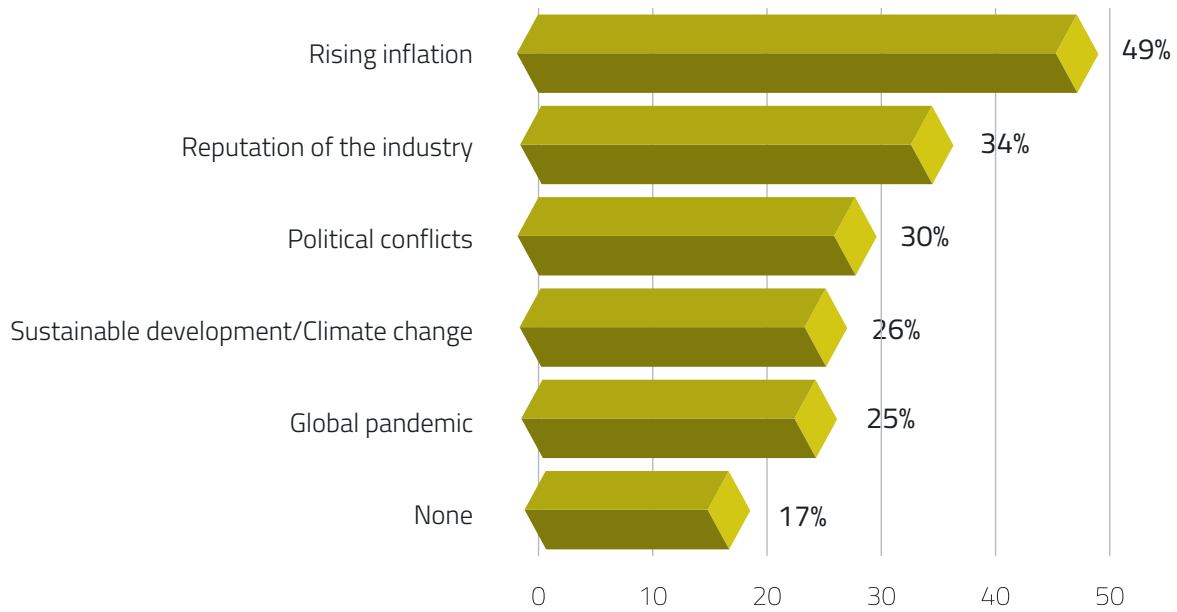
Salary has

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- Stayed the same
- Decreased 1-5%
- Decreased 6-10%
- Decreased +10%

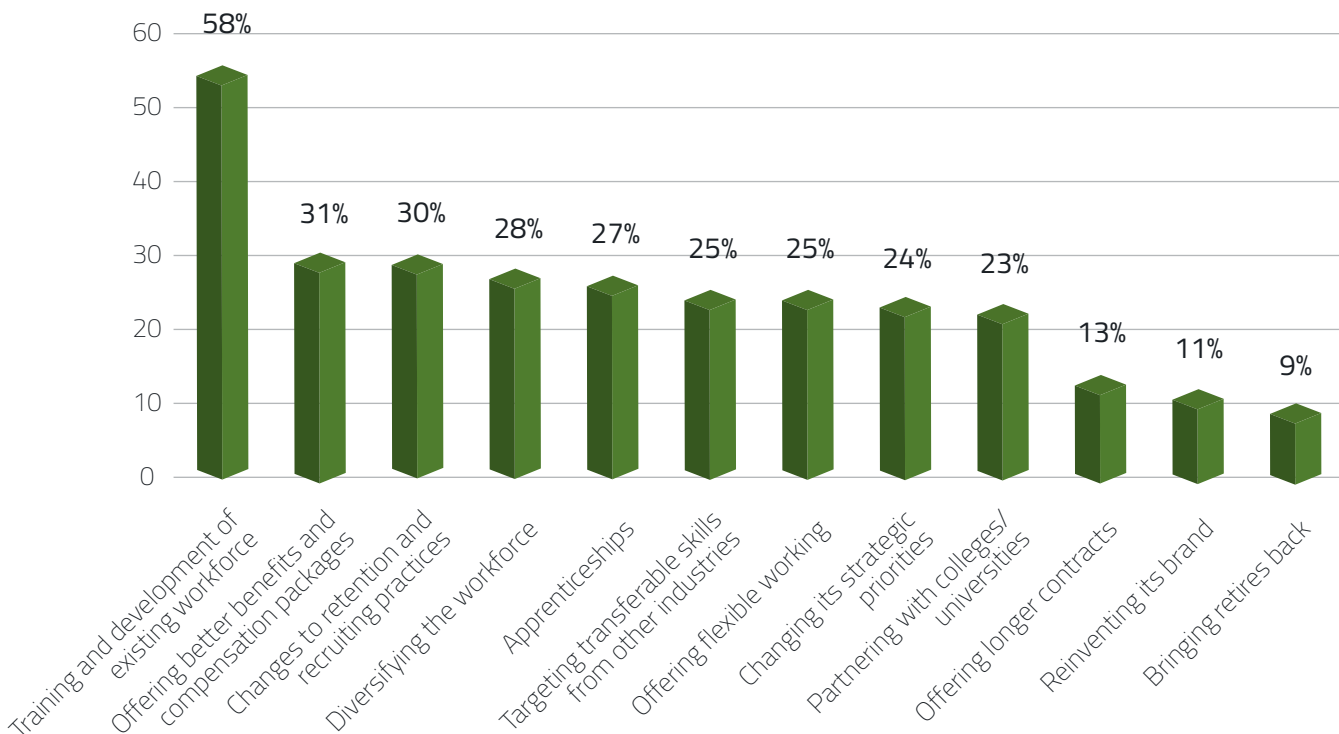


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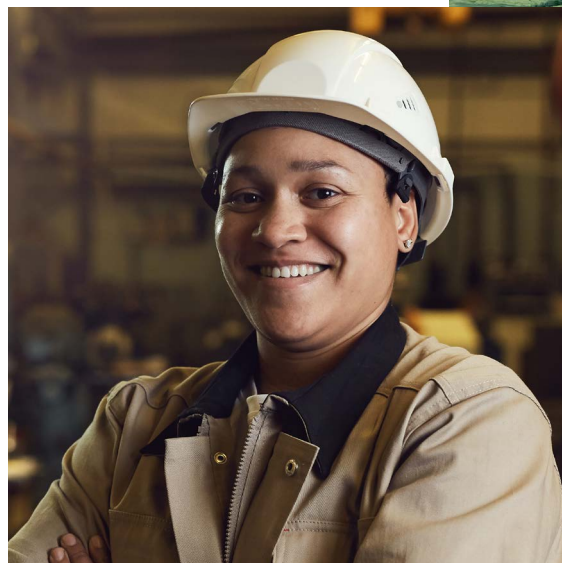
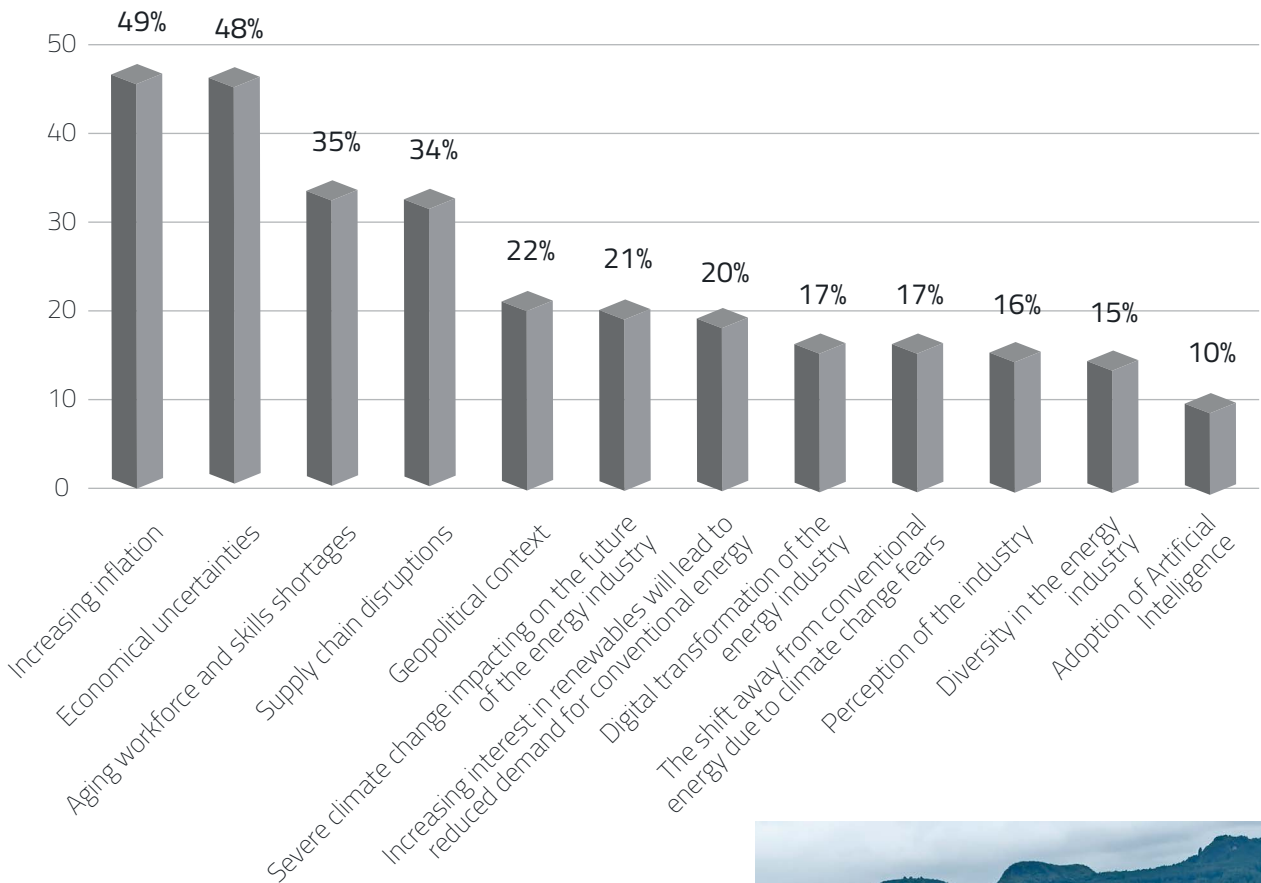


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THE TOP CHALLENGES FACING MANAGERS AND LEADERS OVER THE NEXT FIVE YEARS*



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MIDDLE EAST

The past year has seen the Middle East accelerate its energy transition efforts with an influx of investments in renewable technology. energy prices for fossil fuels remain high, although several national oil companies have divested their interests in hydrocarbon assets. Political influence also continues to have a large impact on the region.

Despite the Middle East's efforts to reduce its reliance on fossil fuels, political conflicts have impacted any significant progress. With spikes in demand for natural gas production, renewable investments have been less of a priority. Although there hasn't been any legislation to make more use of carbon capture and storage technology, there has been increasing interest in its development.

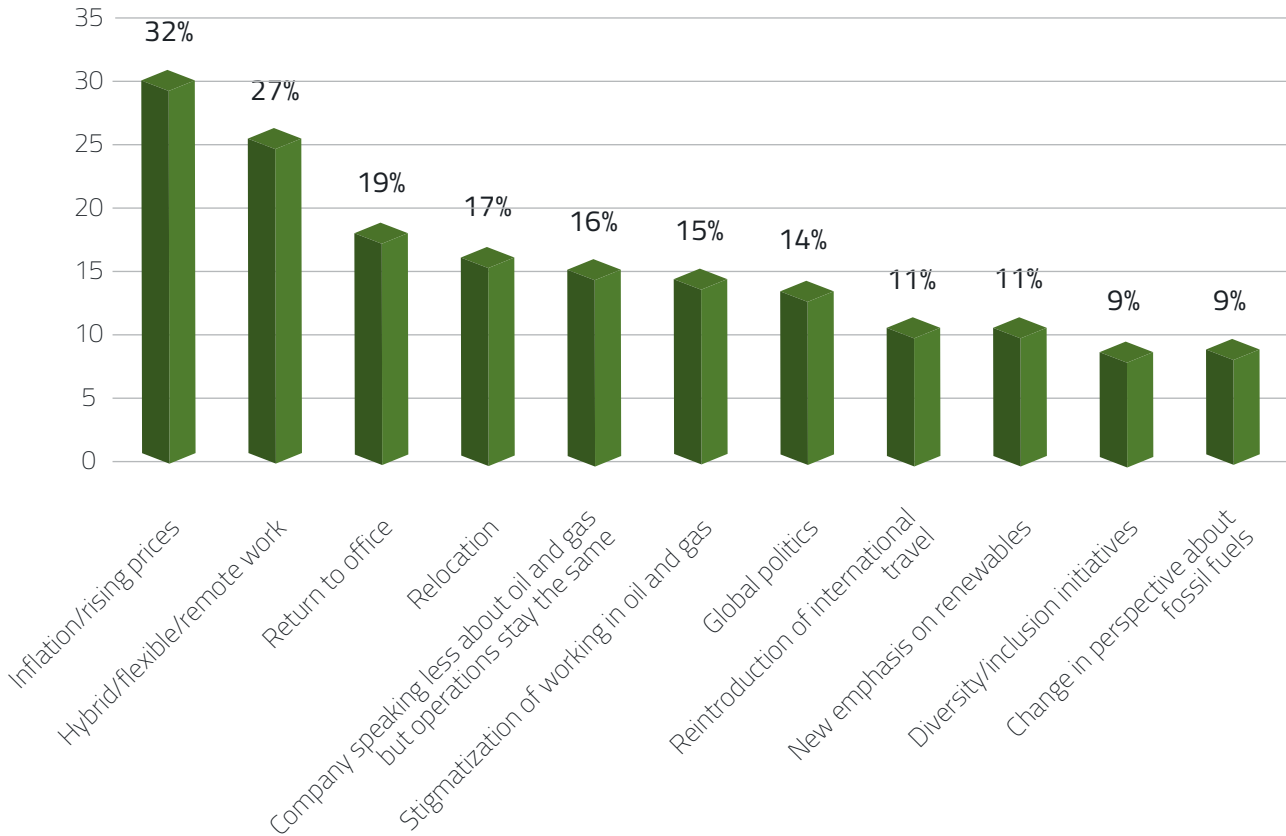
The mining sector has stayed buoyant in the Middle East over the last year. Although the number of new mining licences has declined slightly, there is still a strong focus on the manufacturing of steel, food, polymers and chemicals. In the short-term, the mining industry looks set to accelerate. However, longer-term, the global shift towards renewables will likely see operations slowing down.

SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in the Middle East cited 'rising inflation' as the top answer (42% compared to 40% globally). The second and third most common answers were aligned with global percentages, with a 'global pandemic' (31%), followed by the 'reputation of the industry' (24%).
- 91% of energy workers in the Middle East are concerned about climate change, also in-line with the global percentage.
- Less than half of managers and leaders surveyed in the Middle East expect continued energy shortages in 2023 (48% compared to 56% globally).



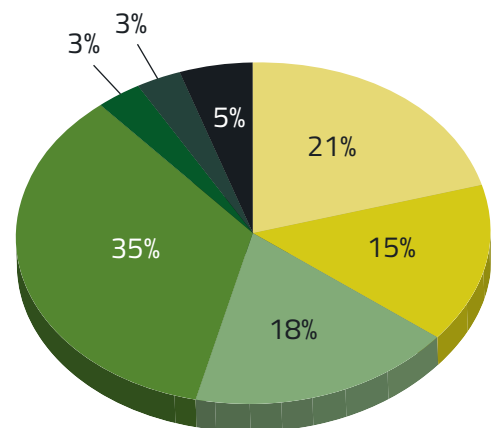
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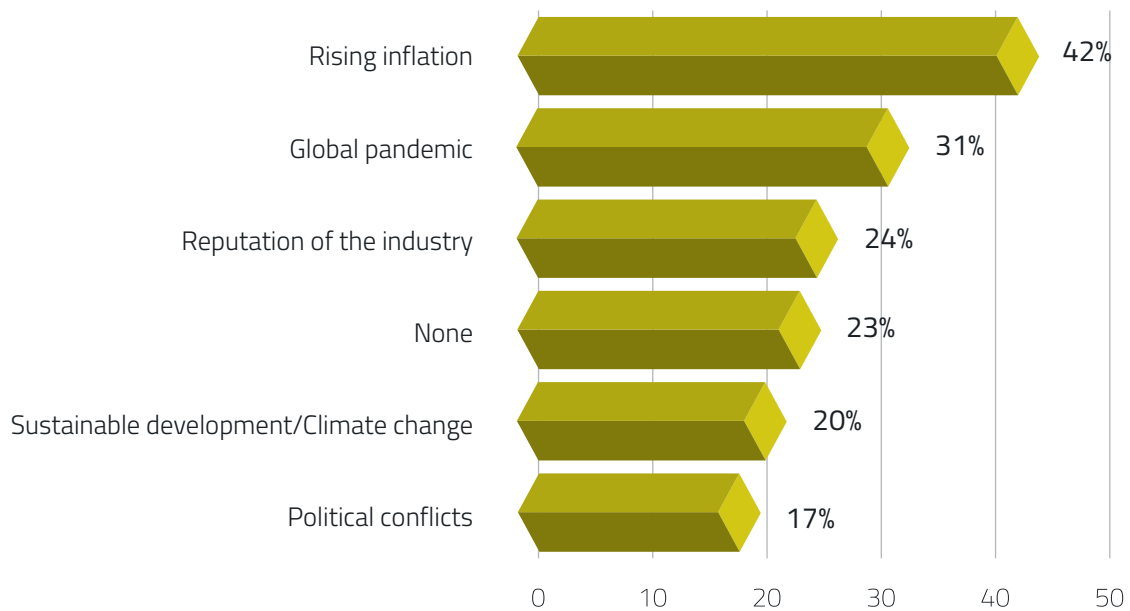
Salary has

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- Decreased 6-10%
- Decreased +10%

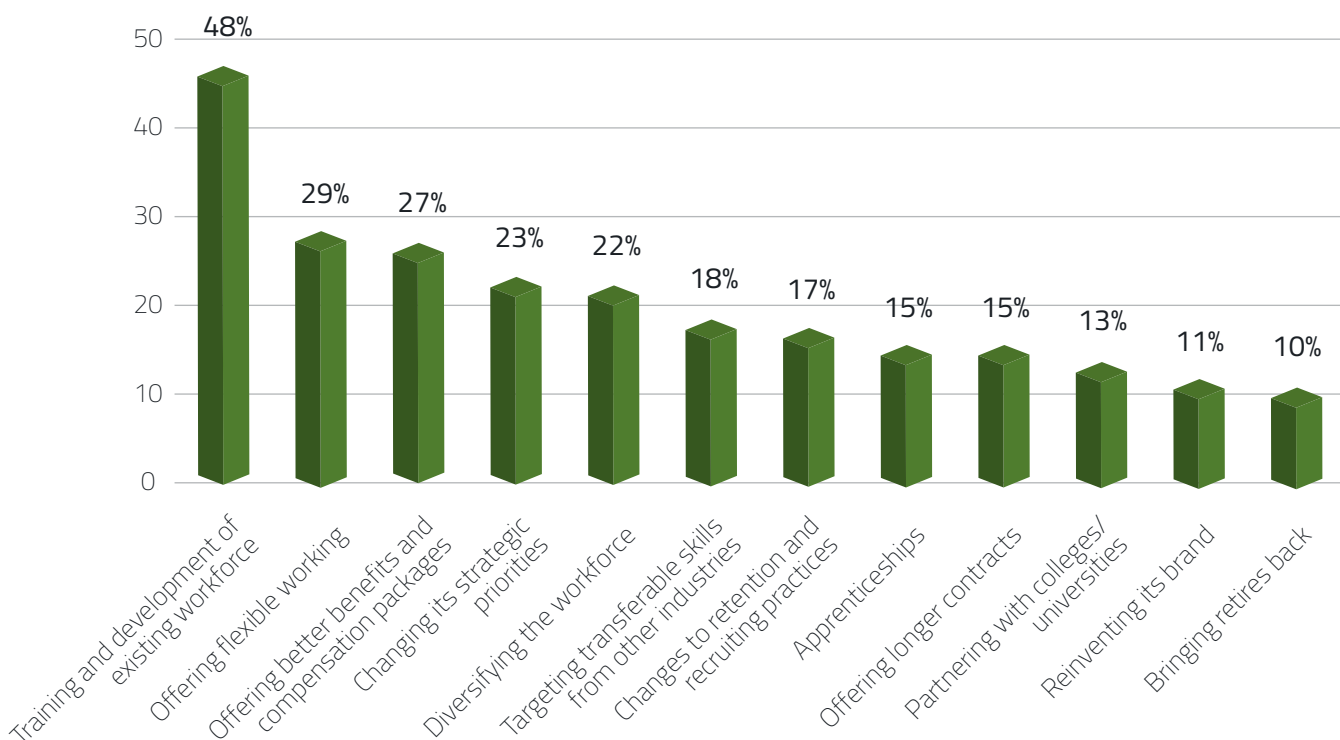


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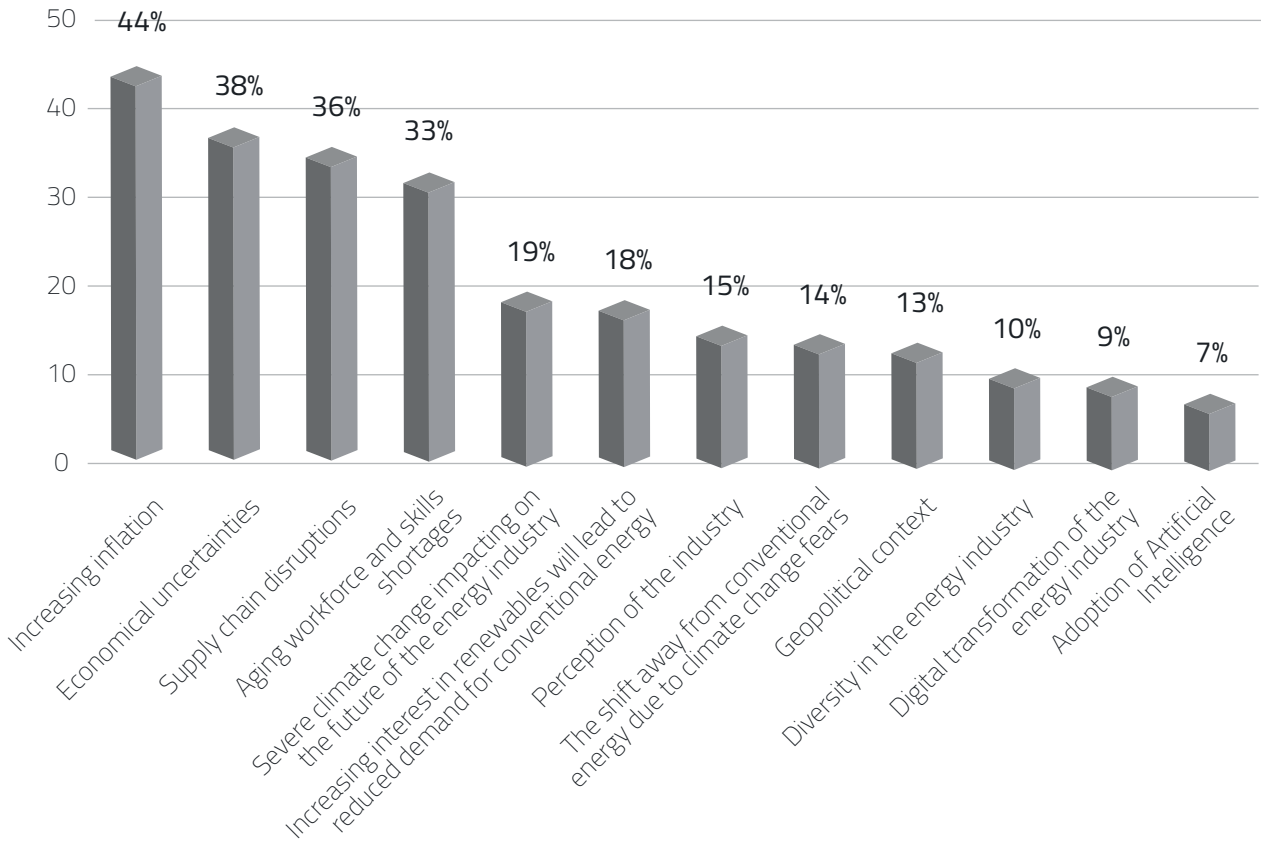


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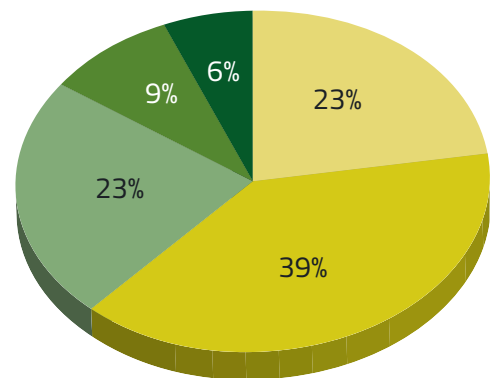
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- Moderately confident
- Somewhat confident
- Not at all confident



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COMMONWEALTH OF INDEPENDENT STATES (CIS)

The CIS members are diverse in their energy systems and their economic structures. Member states like Azerbaijan, Russia, and Kazakhstan are major players in the energy markets due to large hydrocarbon reserves. Other countries like Armenia, Belarus, and Kyrgyzstan are less reliant on fossil fuels and are more focused on accelerating renewables. All CIS members have been impacted by climate change, and all states are signatories of the Paris Agreement.

Most of the CIS members are making increasing efforts to transition to renewable energy use. The challenge faced by most states is creating the necessary infrastructure and regulatory frameworks for renewables. However, new policy measures are helping to remove barriers to development, and encouraging investment in clean technology.

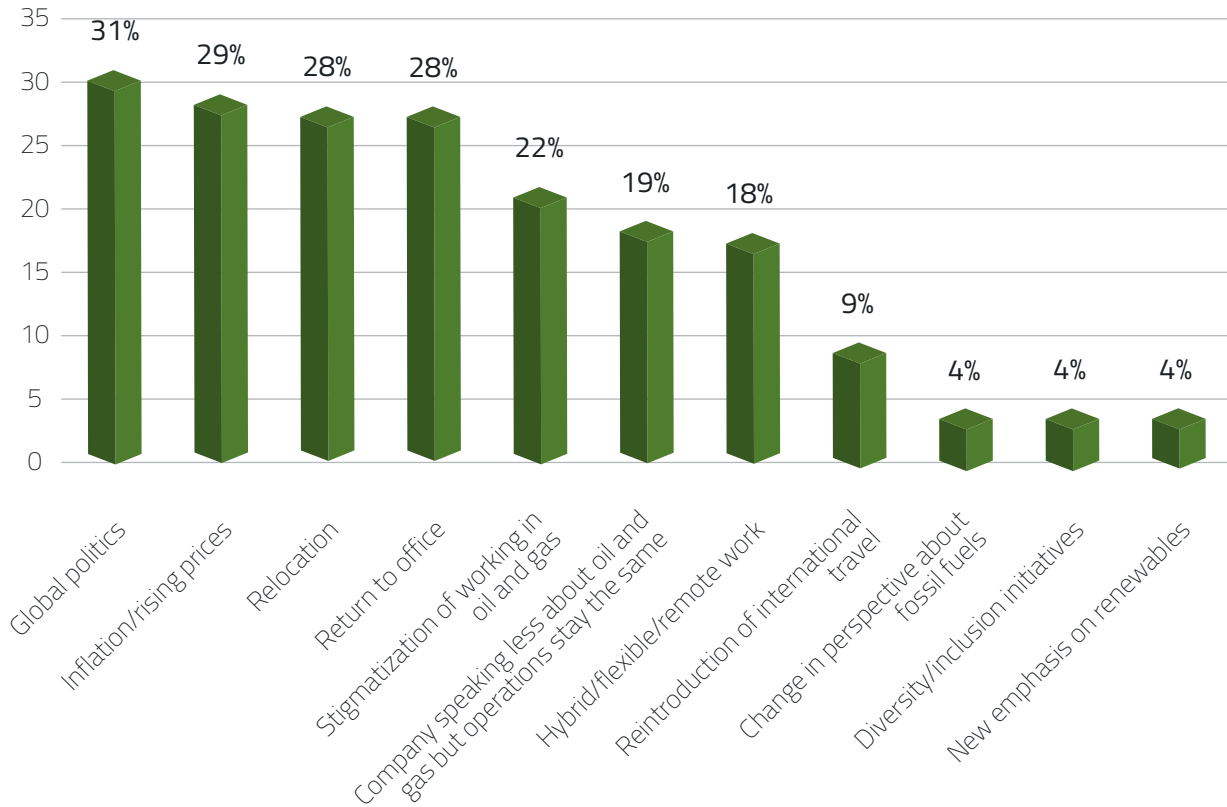
Both Uzbekistan and Russia are known for having large gold reserves, and Uzbekistan is among the top countries in the world with the largest uranium and copper reserves. It's likely that the mining sector will continue to thrive throughout 2023 and that CIS members will form alliances with foreign companies to accelerate growth.

SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in CIS cited 'rising inflation' as the top answer (54% compared to 40% globally). The second most common answer was 'political conflicts' (40% vs 22% globally), followed by 'reputation of the industry' (16% compared to 24% globally).
- 93% of energy workers in CIS are concerned about climate change versus 91% globally.
- Half of managers and leaders surveyed in CIS expect continued energy shortages in 2023 (50% compared to 56% globally).



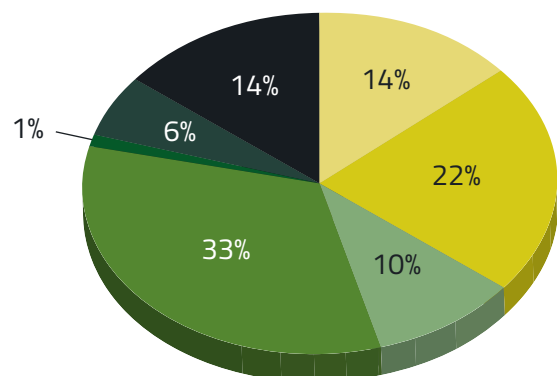
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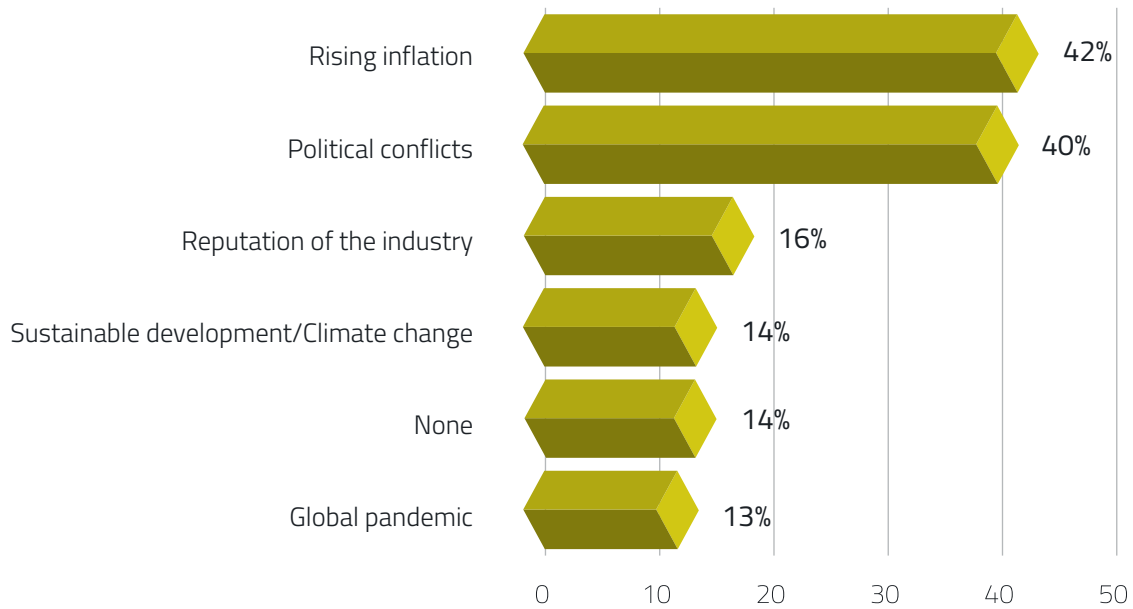
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- Decreased 6-10%
- Decreased +10%

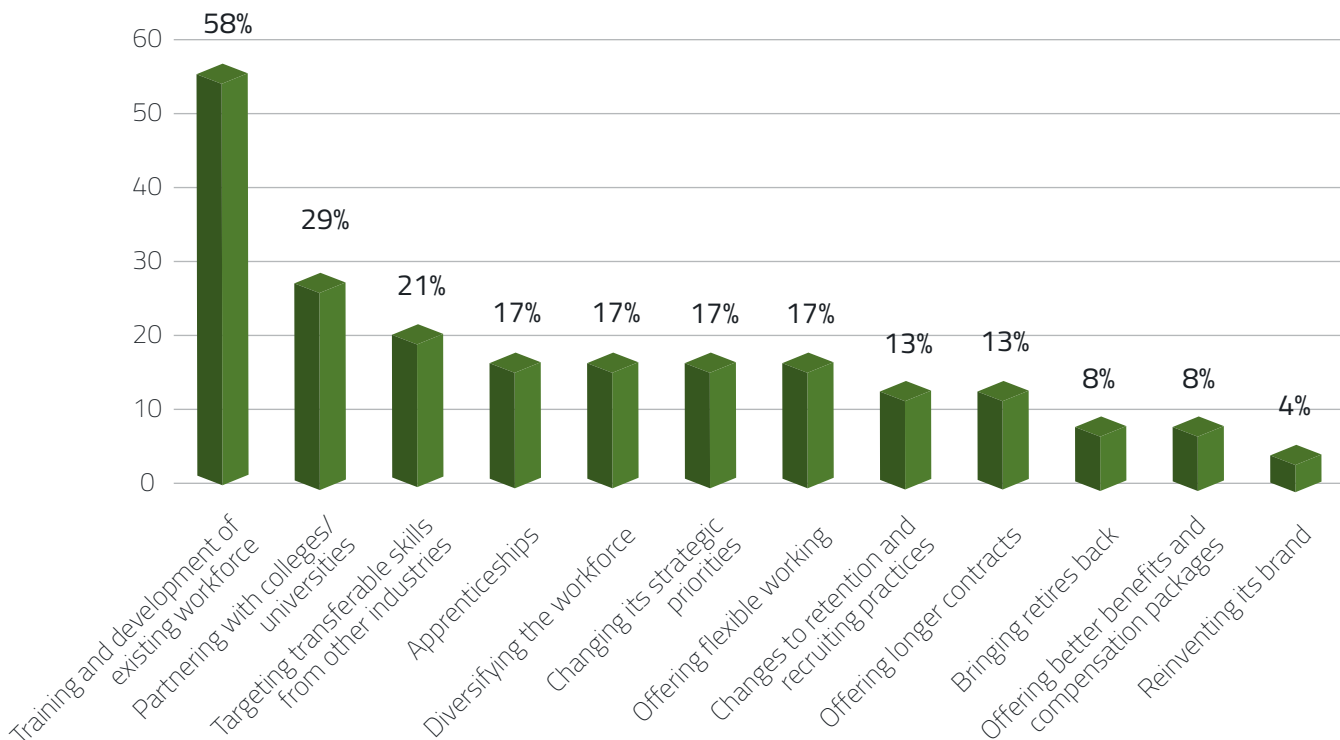


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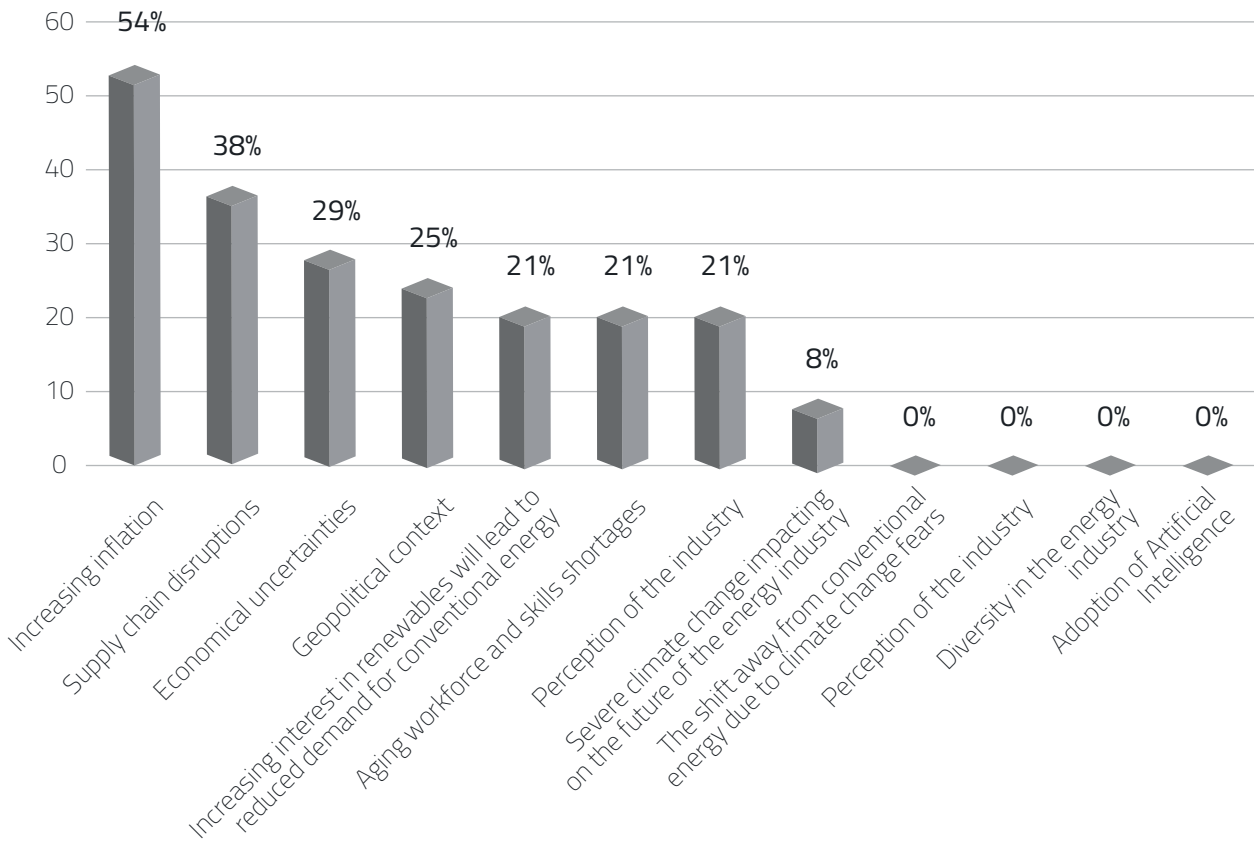


WHAT IS YOUR COMPANY DOING TO OVERCOME THE SKILLS GAP?*



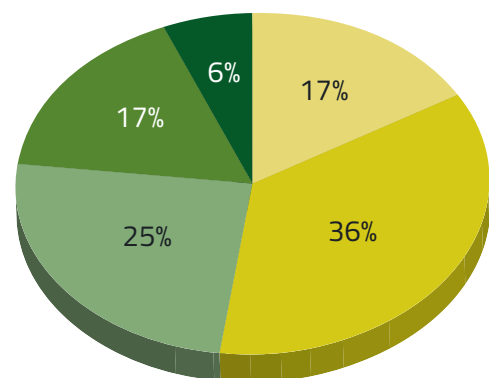
*Graphs highlighting results from a multi select question. As a result, the total response percentage exceeds 100%.

THE TOP CHALLENGES FACING MANAGERS AND LEADERS OVER THE NEXT FIVE YEARS*



HOW CONFIDENT ARE YOU ABOUT FINDING NEW EMPLOYMENT IN THE ENERGY INDUSTRY?

- Extremely confident
- Very confident
- Moderately confident
- Somewhat confident
- Not at all confident



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

ASIA AND PACIFIC

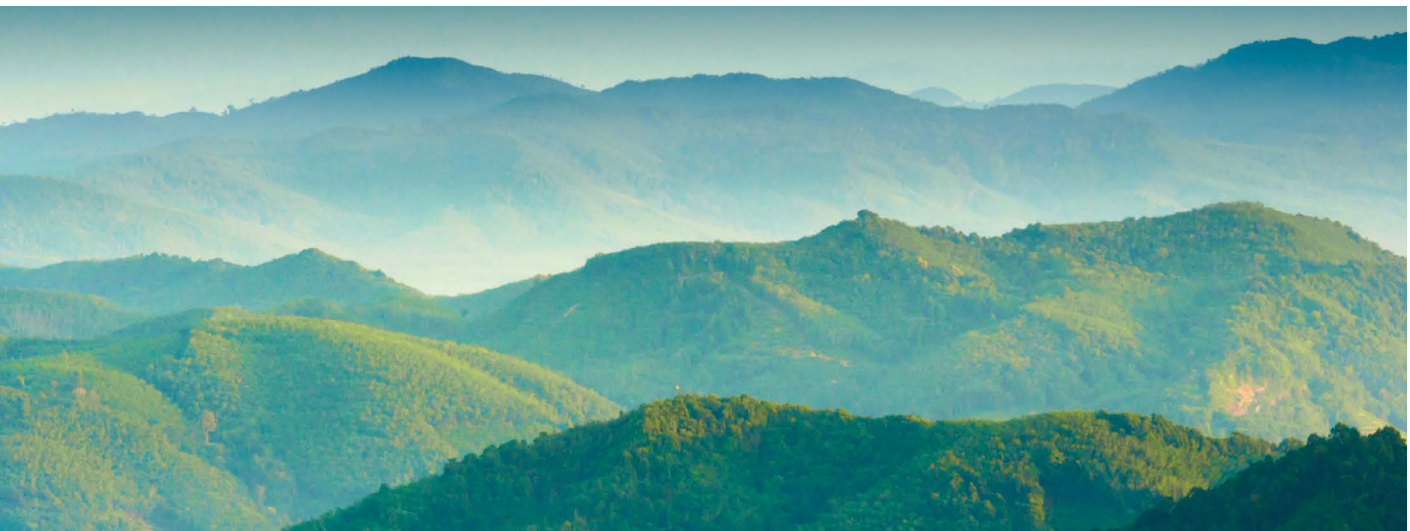
Following a gas shortage post-pandemic, governments across Southeast Asia have set out long-term plans to create a more secure and sustainable future. Investments in energy security remain a top priority following volatile prices for fossil fuels due to political conflicts. Despite increasing its electricity generation from solar and wind power in 2022, China in particular is expected to see an increase in fossil fuel use in 2023.

Across Asia and Pacific last year, despite some supply chain constraints, renewable installations increased due to clean energy demand across the region. The development of renewable energy in Asia and Pacific continues to outstrip other parts of the world due to robust economic growth. China saw expansions in solar and wind power - more so than any other country, and improved its clean energy mix to the highest levels seen by the country to date.

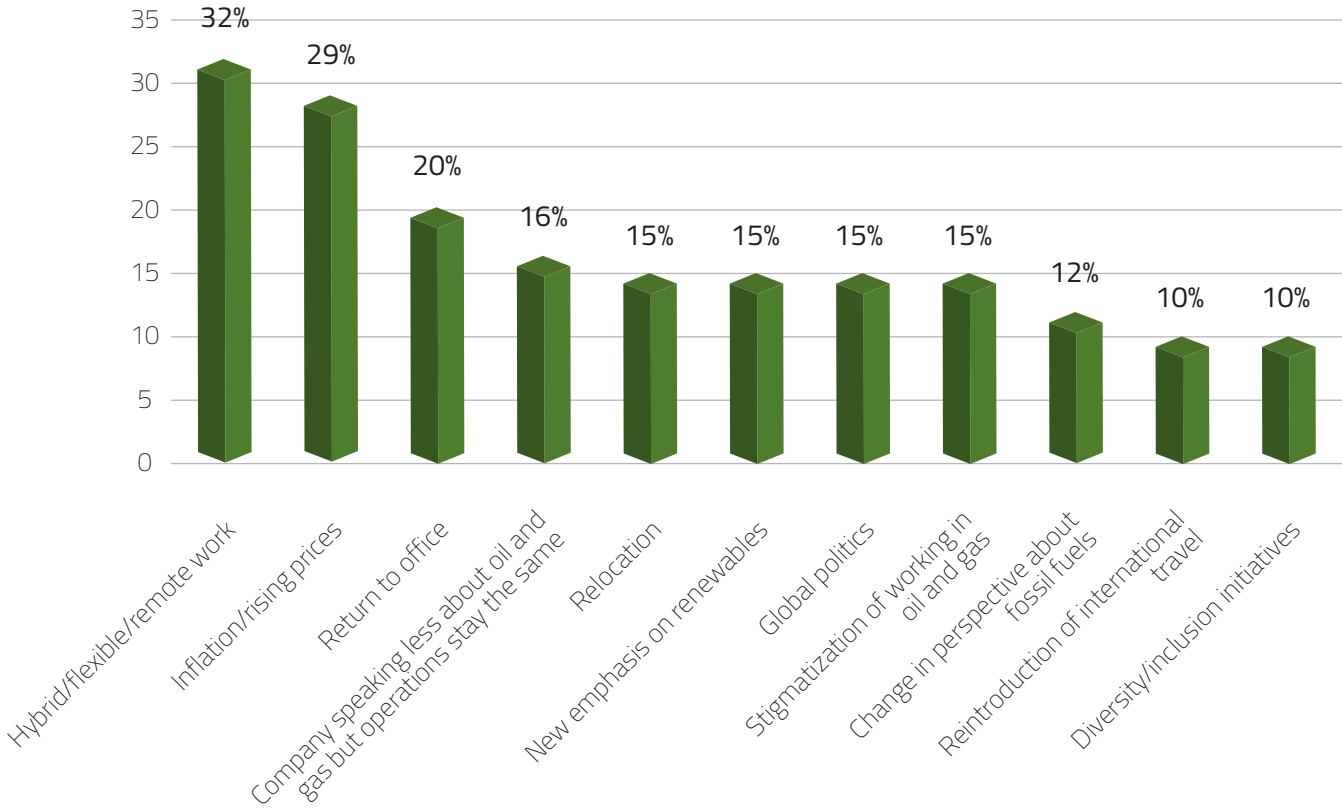
Asia and Pacific's metals and mining industry saw a rise in mining investment and activity throughout 2022. China expanded its 2023 coal term contracts to all mines to stabilise the market. The demand for iron and steel in countries like India also continues to accelerate the mining sector's growth in the region.

SNAPSHOT

- When asked about the reasons that would make them seek new employment, energy workers in Asia and Pacific cited 'rising inflation' as the top answer (41% compared to 40% globally). The second most common answer was 'reputation of the industry' (25% vs 24% globally), followed by a 'global pandemic' (25% compared to 24% globally).
- 90% of energy workers in Asia and Pacific are concerned about climate change versus 91% globally.
- 55% of managers and leaders surveyed in Asia and Pacific expect continued energy shortages in 2023 (compared to 56% globally).



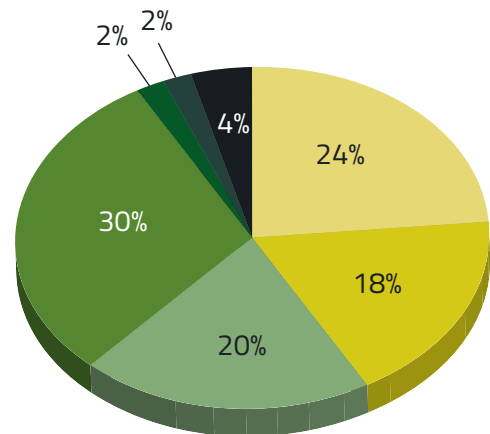
WHAT HAVE BEEN THE BIGGEST CHANGES TO YOUR JOB IN THE PAST 12 MONTHS?*



WHICH BEST DESCRIBES YOUR COMPENSATION COMPARED TO 12 MONTHS AGO?

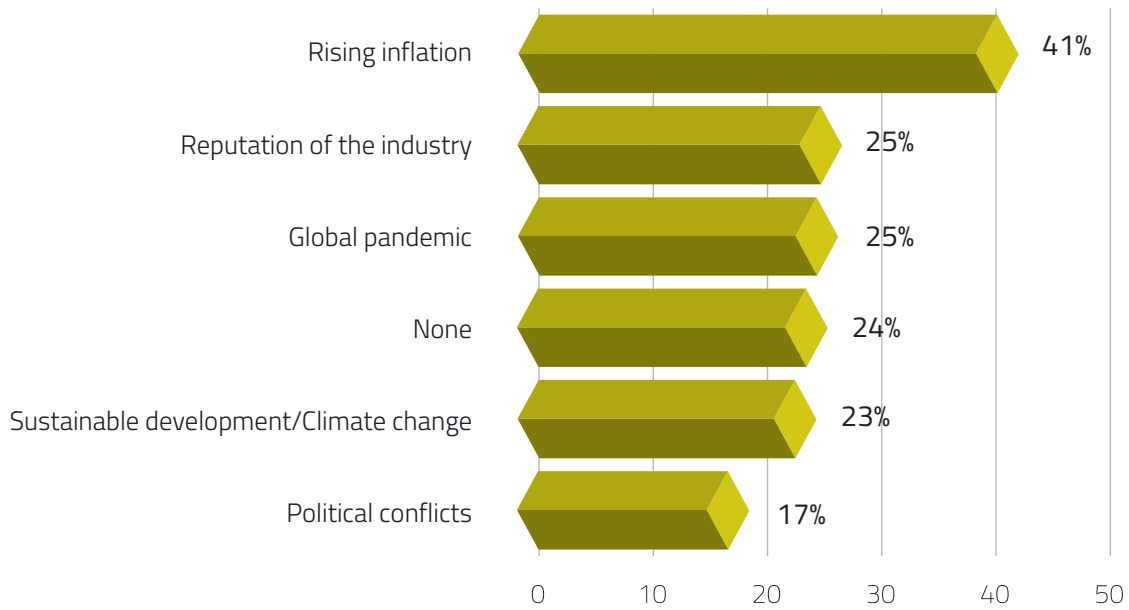
Salary has

- Increased +10%
- Increased 6-10%
- Increased 1-5%
- Stayed the same
- Decreased 1-5%
- Decreased 6-10%
- Decreased +10%

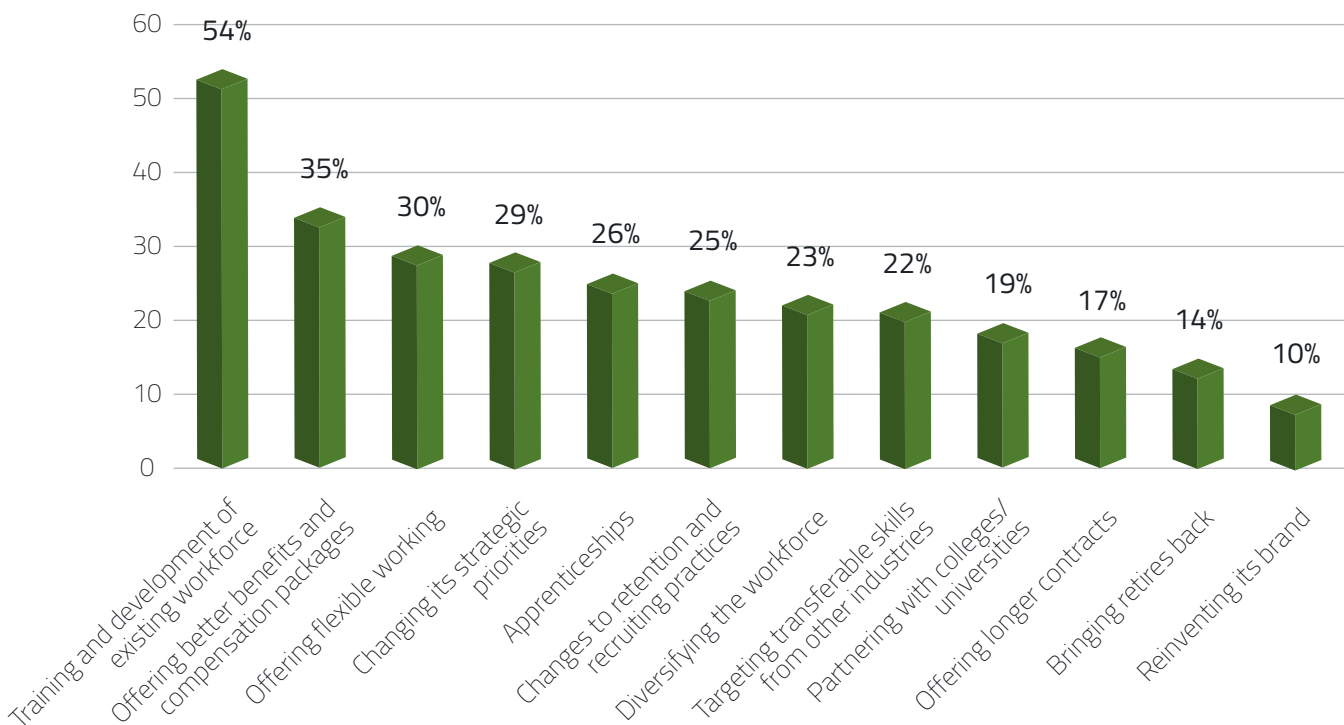


*Graphs highlighting results from a multi select question. As a result, the total response percentage exceeds 100%.

WOULD ANY OF THE FOLLOWING MAKE YOU SEEK NEW EMPLOYMENT?*

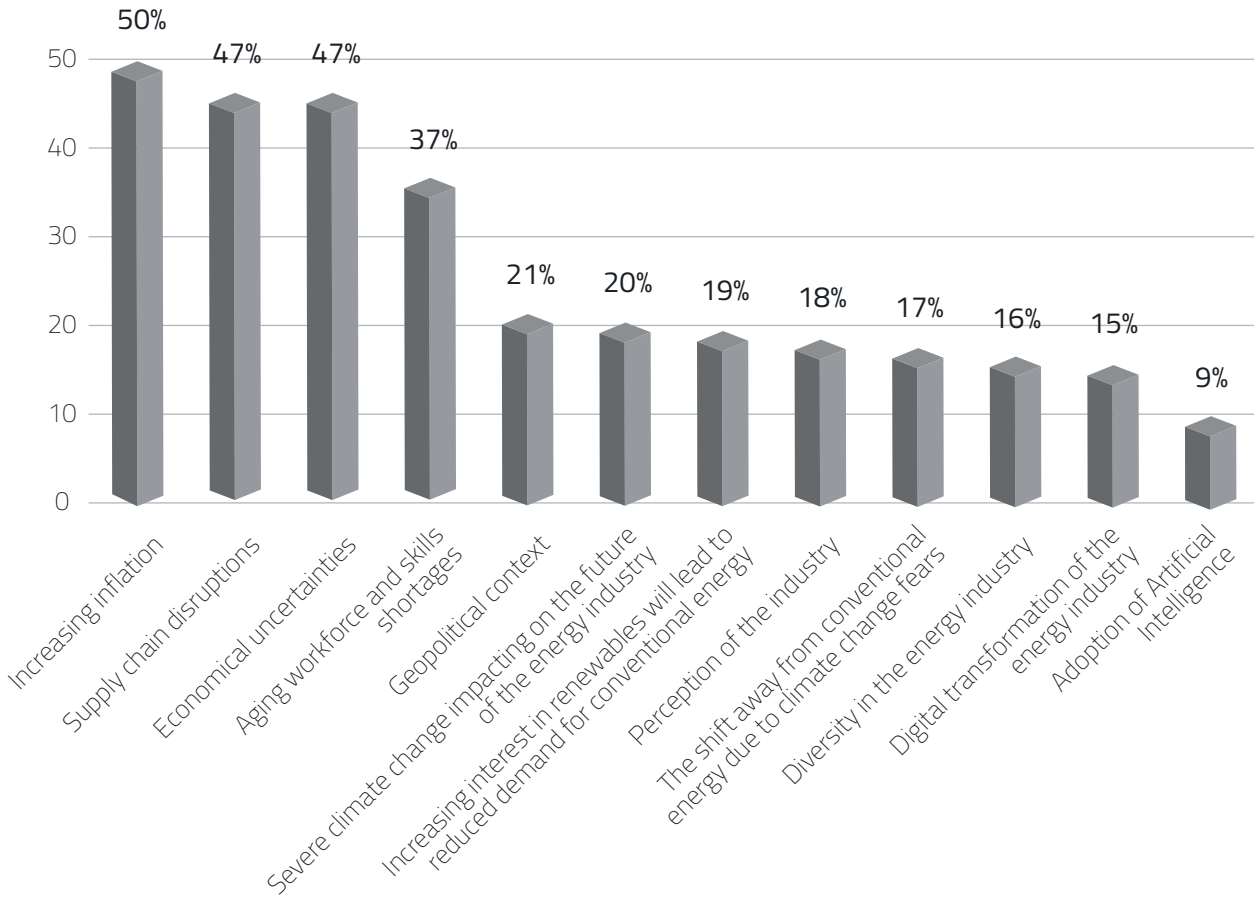


WHAT IS YOUR COMPANY DOING TO OVERCOME THE SKILLS GAP?*



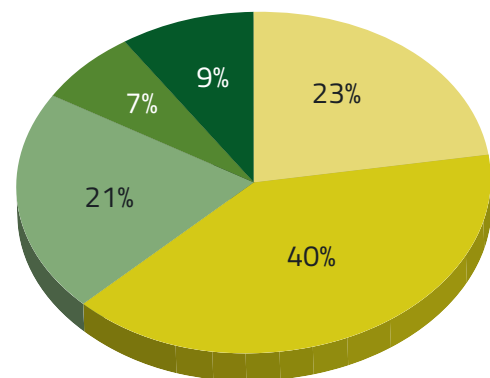
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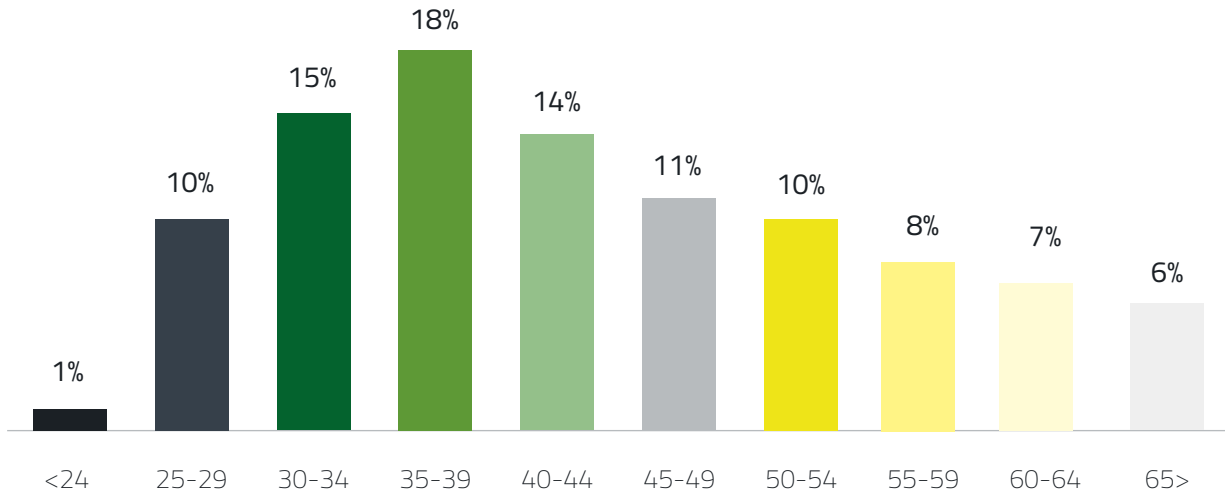
DEMOGRAPHICS

SECTORS OF EMPLOYMENT*

SECTORS	PERCENTAGE
Oil and gas	59%
Renewables	17%
Mining	12%
Chemicals	11%
Nuclear	10%
Automotive	7%
Other	7%

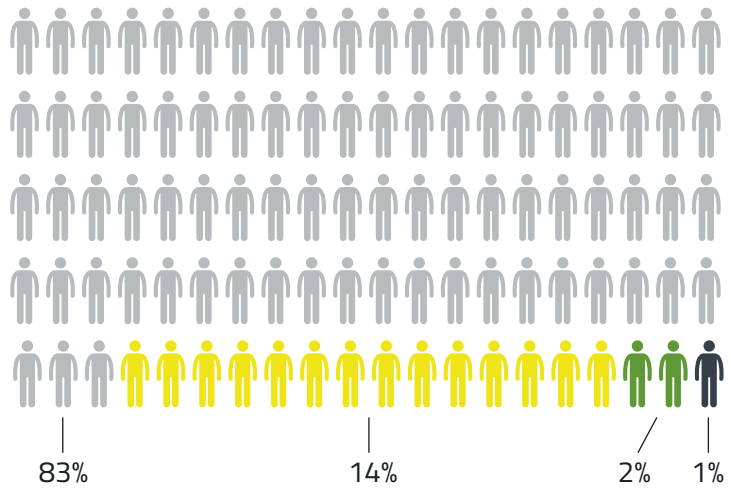
*Graphs highlighting results from a multi select question. As a result, the total response percentage exceeds 100%.

AGE



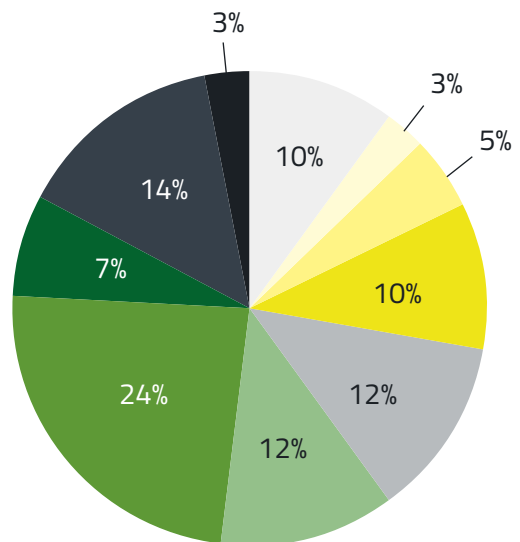
GENDER

- Male
- Female
- Non-Binary
- N/A

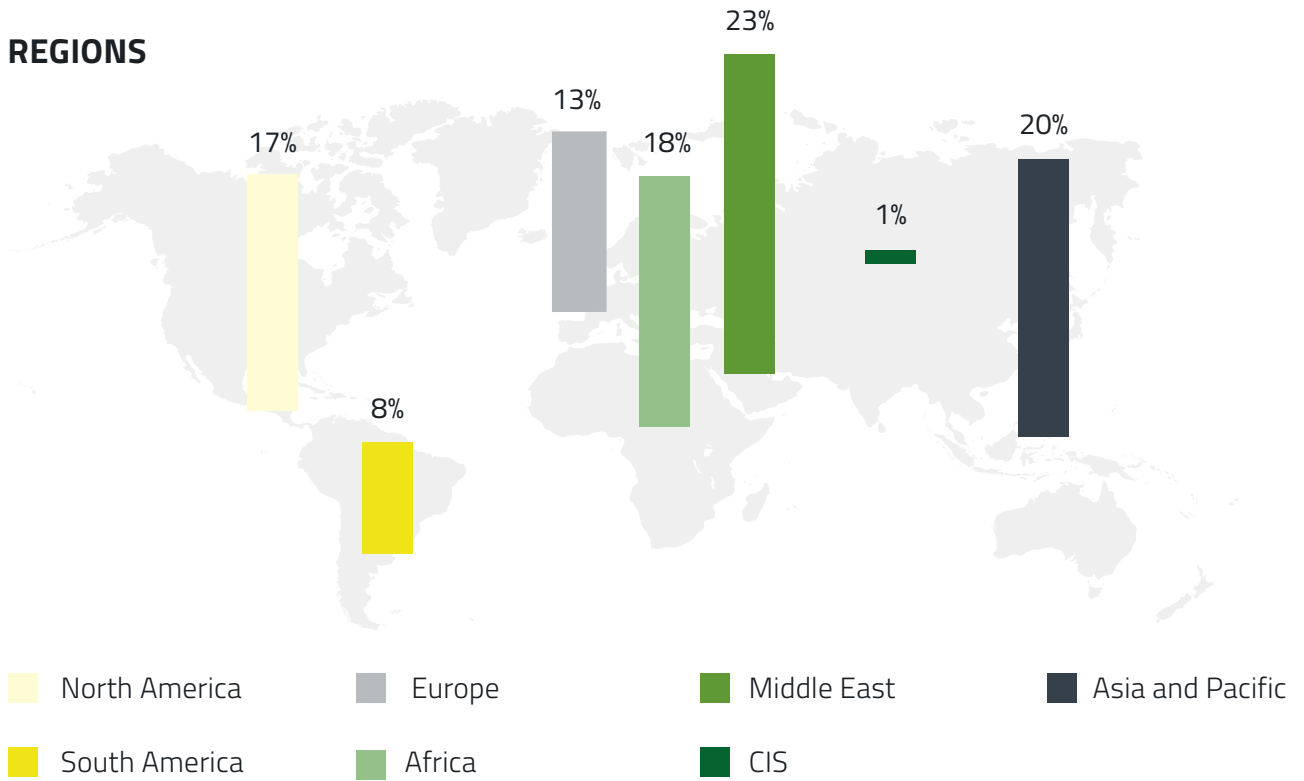


SENIORITY

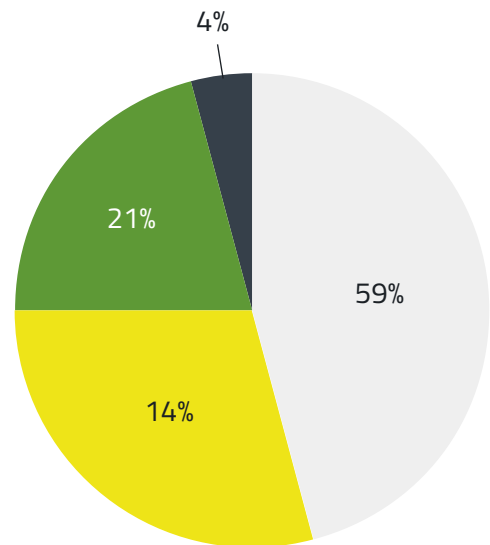
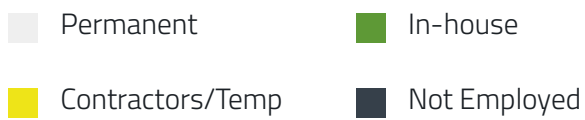
- Graduate
- Entry-Level
- Junior
- Operator/Technician
- Intermediate
- Mid Senior
- Senior
- Lead/Principal
- Manager
- VP/Director



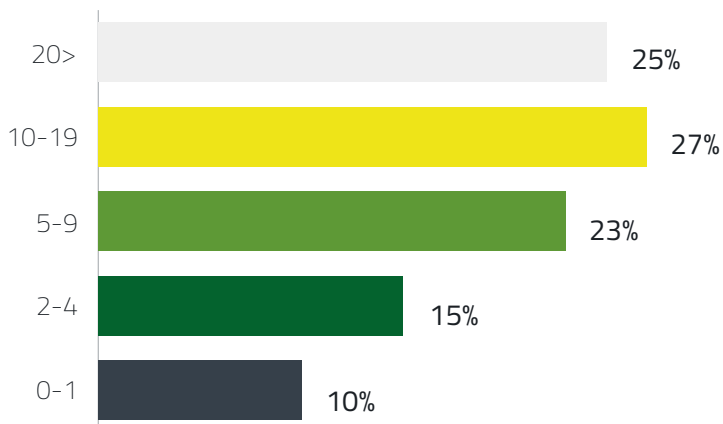
REGIONS



EMPLOYMENT TYPE



YEARS OF EXPERIENCE



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