HAYS Recruiting experts in Oil & Gas

OILANDGAS JOBSEARCH

OIL & GAS GLOBAL SALARY GUIDE

Review of 2013, outlook for 2014.

SURVEY SUMMARY

DISCIPLINE AREAS COVERED	24
COUNTRIES WORLDWIDE REPRESENTED	53
RESPONDENTS ARE EMPLOYERS IN THE INDUSTRY	7,200+
PEOPLE RESPONDED TO THE SURVEY	24,000

THANK YOU

We would like to thank all of you who took the time to participate in our survey.

We'd especially like to thank the teams from Oil and Gas Job Search and from Hays for all of their hard work conducting the survey, analysing the results and producing an excellent document.

Last year we had over 150,000 copies of the Guide downloaded and an additional 20,000 distributed in person and at various conferences, and we hope to surpass these levels this year.

We believe that our growing number of readers is a strong indication of the value and quality of our document, but we are always interested in receiving feedback from you on how to improve and make our study more useful for you.

We hope you enjoy the read and, more importantly, find it useful in your job.

MANAGING DIRECTORS' WELCOME

We are delighted to share with you our Global Oil and Gas Salary Guide for 2014.

Our goal is to provide the industry with an informed view of global and regional trends in compensation and benefits and to identify some of the key industry factors and events that have contributed to these trends.

This is the fifth year that we have conducted our survey and produced this document, and we are proud to say that each year we've seen the level of interest rise and the quality of our document and underlying analysis improve.

This year, approximately 24,000 participants from 53 countries across 24 disciplines responded to our survey.

Once our survey was completed, the data were compiled and cleansed to eliminate spurious samples and outliers.

Next, our regional recruitment consultants, whose daily job is to work with companies to attract and retain permanent and temporary workers, reviewed the data to ensure they reflected the realities of the local labour markets.

We then analysed the findings to identify trends and the reasons behind the results.

We believe that by blending the survey's quantitative data with our recruitment consultants' localised expertise, we produce the best and most representative view of remuneration in the industry.

As always with surveys, statistical errors due to sample size and respondent errors limit the accuracy of any particular figure. In addition, since the people who respond to our survey vary from year to year, changes to the demographics of respondents (e.g., their experience level, location and discipline) will have an impact on our figures that might not represent actual changes in labour markets. For instance, in this year's survey, we had considerably more respondents in lower salary brackets than last year, which has yielded lower average salaries than observed by our recruitment consultants.

In addition, respondents report their salaries to us converted to $US from their local currencies, so fluctuations in the relative value of currencies versus the $US will also impact our results. This year, the $US gained value against most currencies, over 15 per cent against the Australian dollar and Brazilian real, for instance. This has also yielded lower salaries than we've observed in the markets in $US terms.

This year, we have taken into consideration some of these biases to present a like-for-like global average salary alongside the average salary computed from the unadjusted raw data. We have not adjusted the other figures. Nonetheless, we believe that by looking at the results as a whole, and particularly at trends, there is considerable value in this research.

SUMMARY OF FINDINGS

2013 saw a one per cent decrease in like-for-like average salary to $81,184. Contractor day rates broadly declined as well. While perhaps disappointing, this is probably a necessary correction after two consecutive years of significant growth in salaries that have started to threaten the financial performance of some companies and assets.

There were numerous developments across the globe that led to this year's decline, and these will be discussed in the pages to follow.

Despite the decrease in salaries and day rates, there still exist skills shortages in certain areas and in certain disciplines, most pronounced for engineers and technical professionals with 10 or more years of industry experience.

Looking forward, our survey respondents remained confident about the coming year, in terms of industry activity, hiring and salary levels. Over 72 per cent of employers have a positive or very positive outlook on the industry moving into 2014, and over 70 per cent of companies plan to expand their workforce.

This view is supported by a general consensus of industry and economic analysts, who anticipate growth in capital spending in the order of five per cent in 2014. Given this scenario, we would expect the war for experienced talent to remain fierce, and skills shortages to remain the most pressing concern facing the industry.

John Faraguna, **Managing Director, Hays Oil & Gas**

Duncan Freer, **Managing Director, Oil and Gas Job Search**

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SECTION ONE
INDUSTRY PERSPECTIVE

While a detailed analysis of the global oil and gas industry is beyond the scope of this document, here are some of the key issues that have had and will continue to have an effect on the industry's labour markets and remuneration.

GLOBAL PERSPECTIVE

Overall, 2013 saw sluggish economic growth in most of the world's economies, which helped to keep oil prices in a relatively narrow range between $90-105/bbl, above the standard $80 economic threshold but below prices that would jeopardise a fragile global economic recovery.

While there are signs of faster economic growth in the coming year in most regions, and consequently higher energy prices, there are also some analysts who predict lower crude prices due to relatively flat demand and increased production from places like the US, Libya, Iran and Iraq.

The world's oil market is being thrown out of balance largely by light tight oil from the US. In addition, the US now vies with the Middle East in LPG exports, creating downward pressure on global prices in this market.

Finally, in LNG, expansion investments in Australia are being reconsidered in view of potential competition from less expensive North American exports.

How quickly the fracking revolution spreads from the US to other countries with significant shale reserves is perhaps the biggest question in the global energy puzzle over the coming decades. This will also have a profound effect on what skills are required and where.

Worldwide, rising costs of labour and services coupled with only modest increases in revenues have squeezed company profits and cash flow and have sounded an early warning for some companies and investors alike.

While this is causing a weakening in investment appetite in certain cases, the long-term view is still relatively strong, particularly for high potential areas such as Brazil, the Gulf of Mexico, West Africa and the Arctic.

The world's energy demand is expected to increase by 50 per cent in the next three decades, primarily caused by increased requirements in developing nations. Only 50 per cent of the reserves have been developed, which suggests that massive ongoing capital investments will be required in increasingly challenging operating environments.

INDUSTRY PERSPECTIVE

Regional View

North America

The US is projected to become the largest global producer of oil and gas in the world, driven by a surge in production from shale reserves. Imports of gas and oil have dropped by 32 per cent and 15 per cent in the past five years, creating a shifting and uncertain geopolitical environment for major oil producing countries.

Many believe that by the end of the decade the unconventional bubble will burst and the importance of imports, particularly from the Middle East, will again rise.

Due to surging unconventional gas production, natural gas prices have remained low, decreasing the attractiveness of drilling for dry gas and opening the opportunity to export LNG to higher priced markets such as Asia. The US is poised to become the world's largest exporter of LNG. In the meantime, low gas prices have greatly benefitted the chemicals and manufacturing industries, which have announced new investments of as much as $110 billion.

Offshore activity has completely rebounded since the Macondo incident of 2009. Deepwater and ultra deepwater activity is expected to continue to rise, with active rigs increasing from 37 currently to 60 by 2015. Production is expected to increase by 10 per cent next year. Onshore drilling is focused on oil and liquids.

The shale drilling boom has attracted new competition to the service market, which now looks like it might need to consolidate.

The US workforce has grown by over 40 per cent since the recession, and energy companies are forecasting a need for many thousands of engineers by the decade's end.

Due to an aging workforce and difficult immigration restrictions, there is a need to attract more Science, Technology, Engineering and Mathematics (STEM)-skilled workers from schools as well as from other sources, such as the military.

Increasingly, professionals with unconventional expertise are being sought for international assignments.

In Canada, transportation bottlenecks and a glut of oil and gas in the US have led to a general softening of the market and a push to build infrastructure for LNG export.

The government has been enhancing policies to encourage foreign investment and to further develop the required infrastructure to export to Asia and other markets, thus reducing the reliance on exports to the US.

Some companies have announced significant reductions in workforce and others have reduced profit forecasts because of delayed projects. However, other companies are hiring and are even struggling to find adequate skills.

Significantly, the end of 2013 saw a number of large projects get Final Investment Decision (FID) and move into detailed engineering and construction phases. This activity is likely to reinvigorate the competition for talent in this space and we expect to see renewed upwards pressure on salaries and day rates through 2014.

South America

Mexico has passed legislation to open its energy industry to outside investment in order to reverse steeply declining production, which has dropped 20 per cent since 2002. The changes would allow international companies to enter into globally competitive contracts to explore for and produce hydrocarbons and to take ownership of the oil above ground, after paying royalties and taxes. It also permits international companies to open retail gas stations. If the law is implemented successfully, this could create significant activity on the Mexican side of the Gulf of Mexico, an area that has been only lightly explored compared to the highly productive US areas to the north.

In Brazil, Petrobras is having difficulties financing its five year investment plan, which, at over $200 billion, is the world's largest corporate spending programme. This has delayed deepwater projects and has led to sales of some of its international assets. However, successful licensing rounds for the pre-salt in 2013 has led to renewed optimism for 2014 activity levels.

Colombia also had a successful licensing round, but at a more subdued level than Brazil. Exploration is a priority to boost diminishing reserves of crude oil, which stood at around 2.4 billion barrels in 2013.

Akacias is one of the biggest exploration successes in recent years in Colombia, and clearly shows the potential of heavy crudes in the Llanos area. Plans are being made to spend as much as $75 billion by 2020 to increase oil and gas production to 1.3 million barrels.

While 2013 was a relatively quiet year in terms of activity and hiring in both Brazil and Colombia, recruiting efforts are starting to shift into gear particularly in the geoscience and subsea engineering disciplines, predominantly for operations and project managers.

Both countries are trying to reduce their dependence on international workers by attracting nationals who are currently working abroad.

In Brazil, the government estimates it will need an additional 250,000 new professionals this decade and has initiated a programme to attract and develop 200,000 new workers to the industry, but despite a swelling youthful population it is unclear whether there will be sufficiently trained workers to fulfill their needs. It is likely that there will continue to be an influx of as many as 5,000-10,000 international workers per year.

In Argentina, the government has recently relaxed regulations enabling agreements to be put in place to develop the vast Vaca Muerta shale reserves, one of the world's most promising shale formations.

Argentina is hopeful that shale production will help recover energy self-sufficiency it lost earlier this century.

INDUSTRY PERSPECTIVE

Regional View

United Kingdom and Continental Europe

Aging North Sea fields, whose average size is shrinking quickly, are increasingly relying on National Oil Companies (NOC), small operators and service companies to keep production and tax revenues flowing.

Emerging technologies to better visualise the subsurface in order to enhance ultimate recovery will also play an important role in maintaining production levels.

Nevertheless, there is considerable exploration work being conducted, especially on the Atlantic side of the North Sea (west of Shetland). The continued use of new technology is also propping up the Engineering Procurement and Construction (EPC), consultancy and engineering markets with numerous upgrades to platforms and facilities.

London in particular has emerged as a financing hub for smaller start up and midcap E&P businesses exploring in the North Sea and the rest of the world. Over the last 12 months there has been a marked increase in smaller businesses securing finance to exploit recently acquired licenses.

The UK has announced a new tax allowance aimed at boosting the development of shale gas resources in the country. If other European countries, such as Poland, follow suit and overcome geological, political, environmental and other hurdles related to shale production, the global oil and gas industry would face a major rebalancing.

Norway expects to continue record level spending, primarily offshore, although the service sector is experiencing a slowdown as companies have become more focused on increasing cash flow, perhaps foreshadowing a future slowdown in activity.

In the UK, the debate continues regarding the benefit of the influx of migrant workers, primarily Norwegian, Dutch and Americans, who make up nearly 20 per cent of the offshore industry.

The government recently relaxed immigration restrictions on employing non-British engineers in order to address the skills shortage of the industry. Meanwhile, government and private sector efforts to develop graduates in STEM disciplines are underway.

In the North Sea, experienced workers in most disciplines are in demand, as people are being attracted to overseas projects which is reducing the local candidate market. International assignments are often more lucrative and are perceived to offer exposure to more diverse environments compared with the North Sea.

Subsea engineers are in short supply; particularly those working in controls and pipelines, however this isn't new to 2013/2014. Geoscience and subsurface professionals, specifically with development experience in the North Sea, are in high demand driven by a number of new developments over the last 12 months coupled with competition from international opportunities.

In order to find scarce skills and combat salary inflation, some companies are looking to other industries for talent with transferable skills, such as ex-military personnel for operations, logistics and maintenance roles or other engineering sectors such as automotive, defense and aerospace.

In general, Continental Europe tends to have a surplus of well trained and educated oil and gas professionals and acts as an "exporter" of these professionals worldwide. This past year did not see significant changes in activity and so the supply and demand of labour was largely in equilibrium. An exception to this was Poland, where disappointing results in shale exploration has led to a weakening demand for these skills.

Russia and Commonwealth of Independent States (Russia and CIS)

Russia, which relies on oil and gas related duties and taxes, is being threatened by the re-balancing of the global energy market. Exports have dropped due to European economic problems and increased competition from cheaper alternatives. Therefore, Russia's attention, and gas exports, might shift eastward to gas-hungry China.

Many believe that Russia must invest in unconventional resources like the Arctic and shale in order to maintain long-term production. This would likely require a significant inflow of technology and as much as $100 billion in international investment, which is being supported so far by tax breaks. Russia currently accounts for approximately 15 per cent of global production but less than 10 per cent of capital investment.

At the time of writing, large scale rallies were being held in Ukraine to protest the government's refusal to sign a political and trade pact with the European Union, a decision assumed to be heavily influenced by Russia. Adding to the tension between Russia and Ukraine is a dispute over overdue payments owed to Gazprom. The outcome of the current discourse between the countries may have an impact on hiring for Russian and Ukrainian projects.

Perhaps consequently, Ukraine has entered into shale gas production agreements with International Oil Companies (IOCs) to reduce its dependence on Russian imports and possibly achieve energy self-sufficiency.

However, shale efforts in neighboring Poland, Lithuania and Romania have had limited success due to a combination of geology, contractual terms and environmental concerns.

Further south in the Caspian area, activity continues to remain high as do investments in transportation infrastructure.

Middle East

2013 was a relatively steady year for the Middle East, but given the number of infrastructure and field development projects that are now underway, the expectation for 2014 is for much greater activity.

While the Middle East will rely on imported workers for the foreseeable future, there have been government and company efforts to increase the local labour content of the workforce.

These efforts have had some positive impact, supported by the demographic youth bulge in the local population, but the increased blue- and white-collar workforce requirements expected in the next few years will most certainly be met by workers from other regions.

Some of the NOC's have launched worldwide recruitment campaigns for the thousands of engineers they expect to require in the near future.

Growing interest in the Middle East in unconventional resources underlines the general view that the days of easy oil are over. These skills will largely be imported internationally.

Iran in particular has not had access to modern technologies, so there is great potential for increased production if local complexities can be overcome.

OPEC has seen its exports decrease due to slow growth of global demand coupled with surging production from the US.

Given the expected return of production from places like Iran, Iraq and Libya, OPEC may continue to see declines in the short-term.

In the long-term, global oil demand is expected to grow from 90mmbpd to 115mmbpd by 2040 due to population growth and increased per capita energy consumption in developing countries, in the Middle East production will once again regain its dominance.

Africa

Africa currently supplies approximately 12 per cent of the world's oil and is estimated to hold as much as eight per cent of the world's recoverable oil reserves and seven per cent of its gas. About 80 per cent of its oil production currently comes from Nigeria, Libya, Algeria, Egypt and Angola. Given its vast size and potentially untapped resource wealth, Africa is one of the last oil and gas frontiers.

Challenges, however, remain in almost all respects. Security remains a concern, and candidates are increasingly considering their safety and how potential employers are managing security at their facilities before they accept offers. Political uncertainty, fraud and corruption, stringent regulations and restrictions, and a lack of infrastructure and local skills all play a role in inhibiting investment.

Nevertheless, capital investment in East and West Africa should continue as huge potential outweighs concerns about fiscal stability, security and infrastructure.

Historically, E&P focus has been in the west, mainly in offshore and deep water, but that focus is shifting somewhat to the east, particularly in gas exploration, as expectations have not been completely met in western investments. Recently, there have been significant gas finds in Mozambique and Tanzania, and growing interest in oil exploration in Uganda and Kenya.

Deep water skills are still in demand in the west, mostly reservoir and drilling engineering, but increasingly candidates with gas experience, particularly in the feasibility, design and exploration areas, are being recruited in the east.

Some of these skill requirements will be met by workers moving from west to east. A majority of skilled workers will continue to be expats into the foreseeable future.

INDUSTRY PERSPECTIVE

Regional View

Asia

Energy demand is expected to grow by 80 per cent by 2035 in Southeast Asia, further shifting the global centre of gravity of the industry eastward. Singapore has become one of Asia's main energy and petrochemicals hubs and one of the world's top-three oil trading and refining centers. Asia Pacific continues to be a region targeted by global IOCs to achieve growth.

Oil production has peaked, and the region has become a net oil importer in the mid-1990s. Indonesia, Malaysia and Brunei have been significant exporters of gas historically, but are now slowly becoming importers or net neutral.

Investment has been inhibited by challenging legal and ownership issues, raising capital, territorial disputes, infrastructure and technical issues. The region must reduce regulatory uncertainties and offer financial investment frameworks that compensate for risks in order to attract more international investment.

With Singapore's first LNG terminal coming on line, we can expect an increase in demand for candidates with LNG experience. Design and construction of offshore structures (rigs, FPSO, FSO and topsides) remains an expanding market.

There is a shortage of Senior Project Managers, particularly those with a subsea or SURF background and 'mega project' experience. The market is also tight for Asian national Reservoir Engineers, Senior Geophysicists and Geologists.

The manufacturing industry in Asia has continued its drive forward and the Original Equipment Manufacturer (OEM) sector has been an engine for growth for a number of years. With issues of quality and reliability high on the end users' agenda, Asia has made giant strides in improving quality and the results are increased orders and a wider range of products being produced. We expect to see continued demand for sales & business development specialists and operations/plant managers well versed in maximizing productivity and improving quality processes.

There has been pressure on salary levels increasing for Asian nationals. To manage costs, companies are offering increased bonuses and are reducing their reliance on expats where possible.

The drive to invest in and develop local talent in Malaysia continues. This strategy has had a significant positive impact on the talent available, particularly at the senior level.

In the geoscience area many senior roles have been historically occupied by expats. However, companies, such as operators, are now vying for talented local professionals. In response to high demand and short supply, suitable Malaysian candidates at this level can negotiate large salary increases when moving from one company to another. Given the focus on employing local staff, expat salaries are under pressure.

Agreements are starting to be put into place in China to attract international capital and talent to develop shale reserves. China is believed to hold the world's largest technically recoverable shale gas resource, but exploration is at an early stage.

In the upstream market, EPC and other oil field service companies have seen a relatively flat market for their services, and so their hiring has remained stable. In contrast, the downstream market, particularly the production of bitumen and lubricants, is booming and sales and marketing professionals are in demand.

Experienced and skilled engineering professionals specialising in geology and reservoir engineering and with both onshore and offshore knowledge are in short supply in the domestic market.

Australasia

After a number of remarkable years of investment, there will likely be a pause in new LNG projects as US exports are potentially more favourable from a standpoint of pricing, contractual terms, and supply portfolio diversification.

New Australian opportunities for LNG expansion will have to overcome its high-cost environment and highly valued currency.

In the marine support sector, wages and expenses have risen significantly (40 per cent) since 2007, only partially offset by rises in revenue (8 per cent), raising concerns about the ongoing health and competitiveness of the offshore industry.

In Western Australia and in the Northern Territories the focus has come off of the Gorgon and Wheatstone projects and now attention lies with Inpex and other new developments, expansion of existing operations with mid-tier operators and, finally, efficiency measures in existing assets. Offshore-specific disciplines like marine installation and subsea engineering remain in high demand falling in line with the stages of major projects.

The four LNG projects in Queensland (QLD) are all at differing stages with QCLNG coming in first.

APLNG and GLNG have another year of construction to run and have recently signed an agreement to share some pipeline infrastructure to save costs. Due to a mixture of cost, developing FLNG technology and new countries coming into play, the Arrow project has gone back to concept selection phase. The refineries are currently going through significant periods of change and are structuring themselves over the coming months to deal with this. GTL technology appears to be uncompetitive with the current availability of resources in QLD and the pilot plant is likely to be abandoned.

The outlook for 2014 is quite promising with multiple packages of the major projects ramping up in close succession, re-engaging candidates in areas of the market that have been stagnant over the last six months, as well as planned expansion and maintenance works at various on- and offshore operations. Key disciplines that will see a resurgence include HSE, QA/QC, specialist trades and labour, with subsea, installation, project controls and operations and maintenance remaining stable.

With portions of the market remaining flat over 2013, employers are looking to exhaust local resources before they will consider sponsorship. Key technical areas and skillsets specific to new technology like FLNG and dynamic positioning are new to Australia and therefore employers are looking to overseas markets for resources.

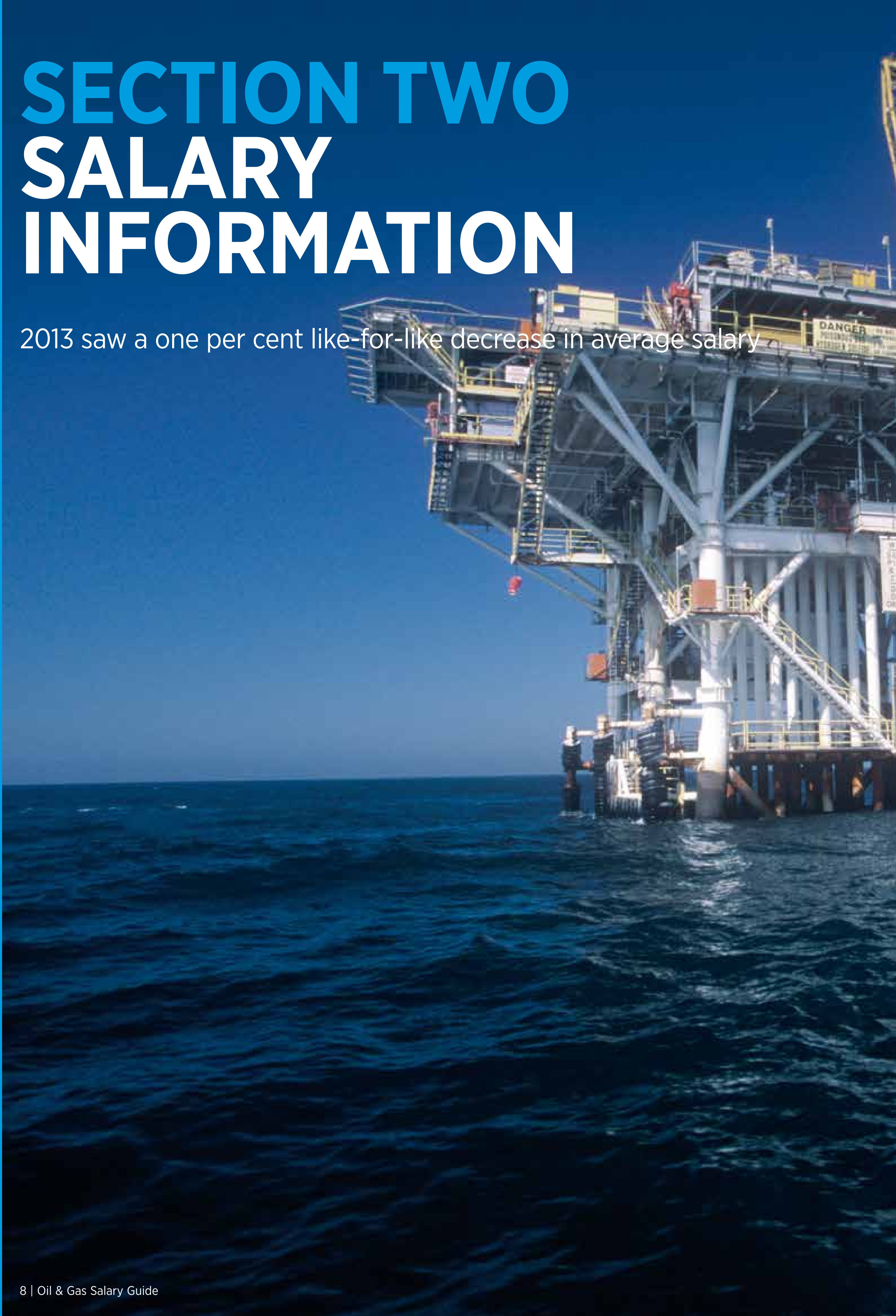
As infrastructure comes into completion, companies are preparing for operations. With the lack of previous local expertise within CSG and LNG we will see demand increase for operations personnel from similar industries as well as training personnel to assist in the transition.

Although a relatively minor player on the global playing field, there is growing interest in the exploration potential in offshore New Zealand.

Due to the potential economic benefits, the government has purposefully attracted international investment to shoot seismic and explore in some of the largely unexplored deepwater basins.

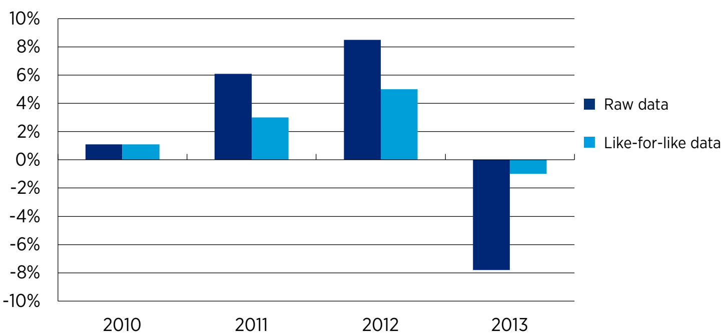
SECTION TWO
SALARY INFORMATION

2013 saw a one per cent like-for-like decrease in average salary



One per cent like-for-like decrease after three years of growth

SALARIES DECLINE FROM 2012 LEVELS



Like-for-like data takes into consideration respondent demographic changes and currency fluctuations.

SALARY INFORMATION

Salary Overview

This past year we saw the like-for-like average permanent salary of survey respondents fall to $81,184*, a one per cent decline from last year's average salary of $81,924.

This represents perhaps a well needed correction after two prior years of significant salary increases.

While the headline decline is significant, the individual country figures portray the numerous forces shaping remuneration in the industry. Whether they are successes or issues stemming from geology, politics, the environment, the economy or in some cases armed conflict, each region's salary tells a story:

- Australia saw flat to slightly declining average salaries after a number of years of unsustainable growth in wages had started to threaten the financial viability of some projects.
- Southeast Asia saw declines in China, Indonesia and Malaysia due to downward pressure on expat salaries, while Singapore remained relatively strong.
- The Middle East was flat to slightly declining except for Qatar due to its increased upstream and downstream activity.
- Russia and CIS were flat to lower due to less reliance on expats as was most of Africa.
- Continental Europe was flat to declining as supply and demand of workers was largely in equilibrium, but in places like Poland there was a reduced need for expats. UK and North Sea salaries were also flat to slightly declining year-over-year.
- Brazil had a second consecutive decline after several years of upwardly spiraling salaries, as further delays in activity reduced the demand for workers. Argentina and Venezuela also saw salaries decline, whereas Colombia a bright spot.
- Canada saw relatively flat salaries as transportation bottlenecks to the US caused jitters in prices and shook investor confidence. US salaries decreased to 2010 levels as low natural gas prices depressed onshore drilling.

Looking forward

At the time of writing the price of oil remained comfortably above $90/bbl and natural gas in the US has rebounded to well over $4/mcf. There is some doubt creeping into the market driven by the possibility of falling prices due to tepid global demand and the impact of increased production from countries such as the US, Iran, Iraq and Libya. If so, it will be interesting to see whether OPEC takes steps to prop up prices to their desired benchmark by curtailing their production.

However, the consensus view is that the US will continue to experience good economic growth and the economies of the UK and other parts of Europe are poised to have improved years. Australia may also have hit its bottom as China's manufacturing output and therefore demand for coal and metals rebounds. In this scenario, energy prices should continue to remain within a relatively narrow band between $90-110/bbl, perhaps with upside, which would drive increased spending in 2014, perhaps on the order of five per cent over 2013 levels.

Assuming this happens in 2014, we would expect salaries to rise in the five per cent range, but with a wide variation between disciplines and countries.

The like-for-like global average salary for 2013 was $81,184; broken down this translates to local talent average of $68,900 and imported talent average of $100,600

*Respondents were asked to provide their base salary only in US dollars equivalent, converting foreign currency into US dollars at the time of responding.

ANNUAL SALARIES BY COUNTRY	Local average annual salary	Imported average annual salary
Algeria	39,600	96,700
Angola	51,300	110,600
Argentina	75,800	106,900
Australia	163,700	164,000
Azerbaijan	54,800	133,800
Bahrain	34,000	69,300
Brazil	90,600	125,800
Brunei	99,300	119,400
Canada	130,000	119,200
China	62,900	125,600
Colombia	100,300	137,000
Denmark	98,800	115,200
Egypt	37,500	105,200
France	101,200	103,300
Ghana	26,800	128,500
India	37,700	63,700
Indonesia	41,900	129,600
Iran	39,800	83,700
Iraq	49,100	114,500
Italy	66,100	86,100
Kazakhstan	38,900	117,000
Kuwait	79,600	84,600
Libya	36,000	68,700
Malaysia	47,900	115,400
Mexico	79,600	132,700
Netherlands	111,000	101,500
New Zealand	100,800	127,700
Nigeria	48,500	129,800
Norway	179,200	110,400
Oman	87,800	90,000
Pakistan	32,200	93,500
Papua New Guinea	52,900	99,800
Philippines	30,000	120,100
Poland	36,400	58,200
Portugal	75,400	106,000
Qatar	47,200	84,000
Romania	33,800	103,900
Russia	68,300	127,000
Saudi Arabia	58,400	76,600
Singapore	86,400	97,600
South Africa	63,100	76,300
South Korea	70,000	156,500
Spain	66,900	94,100
Sudan	24,100	77,600
Thailand	59,300	143,200
Trinidad and Tobago	59,000	80,400
Turkey	50,400	77,000
United Arab Emirates	65,100	80,000
United Kingdom	94,200	91,800
United States of America	111,800	118,100
Venezuela	50,000	85,600
Vietnam	26,600	142,200
Yemen	36,300	150,200

SALARY INFORMATION

Salaries by Discipline Area

ANNUAL SALARIES BY DISCIPLINE AREA	Operator/ Technician	Graduate	Intermediate	Senior	Manager Lead/ Principal	Vice President/ Director
Business Development/Commercial	53,600	36,000	41,800	59,700	101,100	168,100
Construction/Installation	61,000	37,000	54,500	76,800	105,700	188,000
Downstream Operations Management	55,000	42,000	50,000	83,700	92,000	163,400
Drilling	65,200	37,000	67,900	86,900	125,800	199,900
Electrical	61,200	38,100	48,500	70,100	87,200	N/A
Estimator/Cost Engineer	35,000	30,000	46,700	74,000	102,000	N/A
Geoscience	60,000	45,000	56,000	95,400	137,100	222,300
Health, Safety and Environment (HSE)	42,500	34,500	55,800	71,800	94,500	182,300
Logistics	55,900	31,300	35,000	65,000	85,000	116,900
Marine/Naval	72,000	32,900	67,600	80,300	98,200	175,000
Mechanical	50,000	38,000	42,600	69,200	87,100	102,000
Piping	47,000	34,000	43,000	59,900	86,900	N/A
Process (chemical)	49,400	38,900	46,200	73,700	113,000	125,400
Production Management	55,800	32,400	52,100	79,600	109,700	242,200
Project Controls	55,000	40,000	50,600	72,600	111,200	156,500
Quality Assurance/Quality Control (QA/QC)	49,300	36,500	53,700	60,000	92,900	134,000
Reservoir/Petroleum Engineering	45,900	44,800	67,800	105,700	131,900	262,800
Structural	57,700	36,000	41,800	73,000	93,000	204,100
Subsea/Pipelines	54,200	41,400	62,400	89,100	134,500	199,000
Supply Chain/Procurement	45,600	31,900	53,800	72,100	86,600	186,800
Technical Safety	61,300	35,000	60,700	74,300	115,200	185,000

Breaking down the data into disciplines and comparing against last year's figures highlights the effects of the factors discussed in Section One.

In general, high demand skills like reservoir/petroleum engineering and subsea engineering continued to see an increase in salary. So did skills in unconventional exploration and production.

Conversely, most other disciplines realized flat or single digit declines in their salaries.

Salary declines occurred more or less uniformly across all levels of seniority.

Most disciplines realised flat or single digit declines in their salaries

Contractor Day Rates

CONTRACTOR DAY RATES BY REGION	Operator/ Technician	Intermediate	Senior	Manager Lead/ Principal	Vice President/ Director
Australasia	700	660	910	1,190	1,160
North East Asia	230	220	450	700	1,030
South East Asia	210	150	230	310	630
Eastern Europe	270	180	350	460	N/A
Northern Europe	340	330	660	880	1,120
Russia and CIS	270	190	540	700	760
Western Europe	370	440	630	810	1,020
Middle East	280	250	350	500	990
East/South Africa	240	270	440	570	N/A
North Africa	280	250	350	470	N/A
West Africa	290	270	500	620	N/A
North America	440	600	660	790	930
South America	370	280	380	630	910

Like permanent salaries, contractor day rates were largely flat or declining across regions and levels of seniority

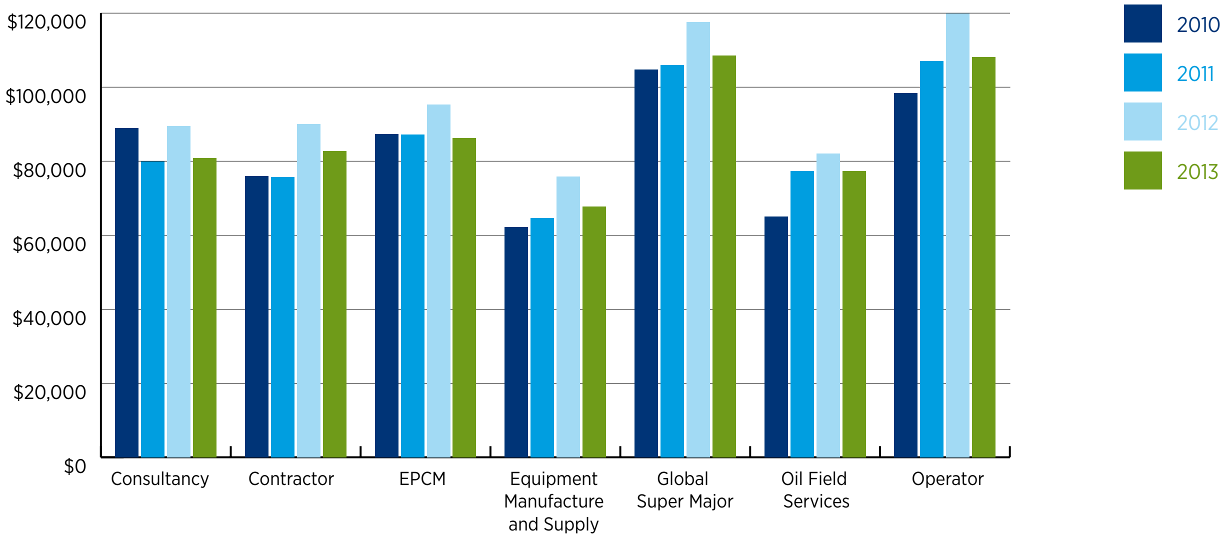
SALARY INFORMATION
Salaries by Company Type

ANNUAL SALARIES BY COMPANY TYPE	Operator/ Technician	Graduate	Intermediate	Senior	Manager Lead/ Principal	Vice President/ Director
Consultancy	51,000	41,200	46,600	80,000	111,200	155,300
Contractor	67,600	40,600	55,600	67,700	98,300	167,000
EPCM	57,000	43,500	49,000	78,300	117,800	172,400
Equipment Manufacture and Supply	47,700	37,000	45,300	60,300	75,800	140,000
Global Super Major	75,900	63,000	76,600	101,600	124,300	210,000
Oil Field Services	53,000	39,300	54,500	65,000	86,700	166,000
Operator	58,500	43,500	65,000	101,300	145,500	234,500

All company types experienced single digit declines in average salary from last year, and salaries are broadly back to 2011 levels.

In terms of the magnitude of base salary by company type, Global Super Majors and other Operators continue to lead the pack, as expected

SALARY CHANGES BY COMPANY TYPE



This chart presents the raw survey data only.

Background for this section

Only where the sample size is large enough have we listed figures in these tables. Where not enough responses were received, entries are returned as N/A.

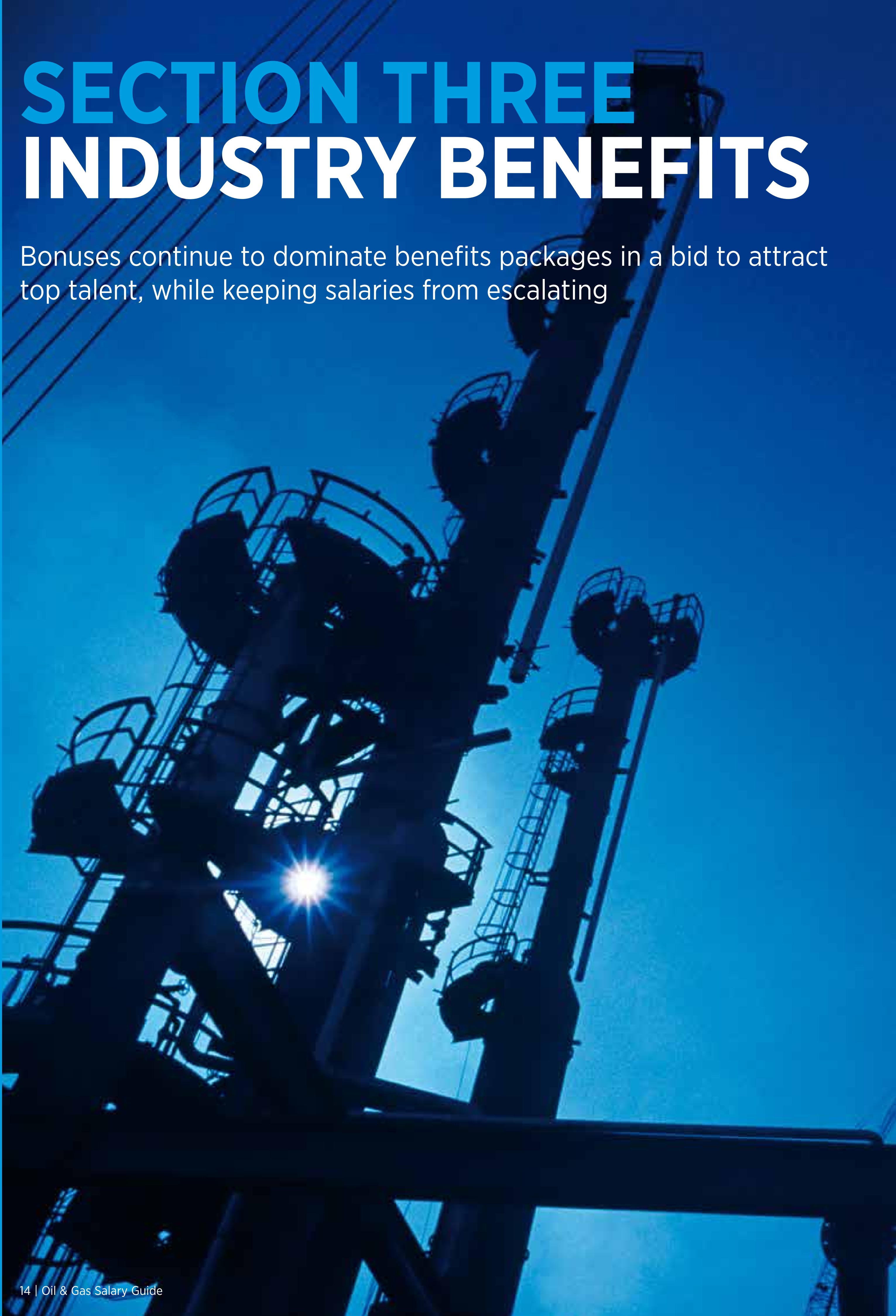
Permanent staff salaries are the figures returned by respondents as their base salary in US dollar equivalent figures (respondents were asked to convert their salary into US dollars using xe.com at the time of responding) excluding one-off bonuses, pension, share options and other non-cash benefits, for those working on a yearly payroll. Those on a daily payroll are extracted and listed separately.

The average salaries listed under local labour are representative of respondents based in their country of origin. Salaries listed under imported labour are representative of those who are working in that country but originate from another.

Contractor rates are listed as US dollar equivalent day rates as listed by respondents.

SECTION THREE
INDUSTRY BENEFITS

Bonuses continue to dominate benefits packages in a bid to attract top talent, while keeping salaries from escalating



Bonuses remain the most popular benefit offered by companies, however health plans are on the rise

TOP FIVE BENEFITS RECEIVED OVER FOUR YEARS

	2010	2011	2012	2013
Bonuses	36.7%	38.1%	42.8%	42.8%
Health plan	25.7%	27.9%	32.4%	33.2%
Home leave allowance/flights	19.1%	21.2%	23.9%	24.0%
Hardship	20.6%	21.7%	24.3%	22.8%
Housing	20.0%	20.4%	24.5%	23.0%

INDUSTRY BENEFITS

Overview of Industry Benefits

Once again the number of people receiving benefits has increased. Compared to 2012, we have seen a two per cent increase in the number of people receiving benefits.

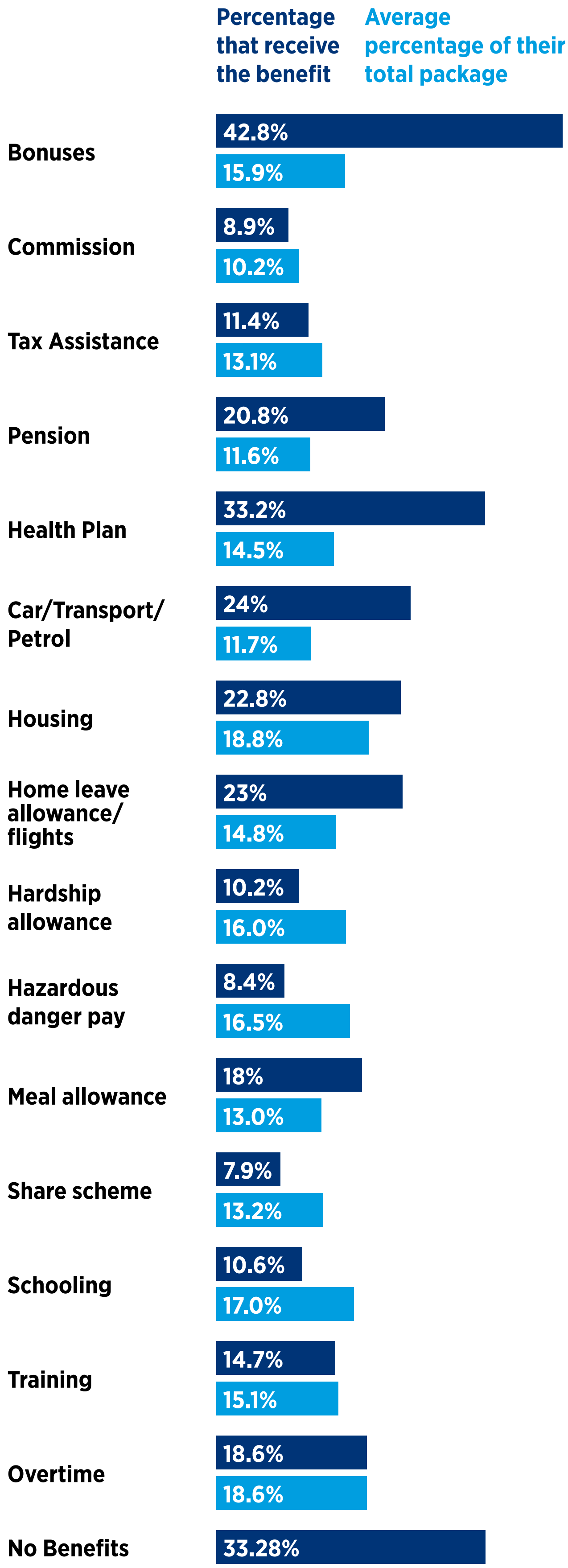
As candidate shortages continue to rise, it is evident that employers are utilising benefits such as bonuses as a mechanism for attracting top talent. Despite this increase, there is a still a significant portion of oil and gas professionals not receiving benefits (33 per cent) worldwide. Employers who utilise their benefits as a key selling feature may be able to more effectively target this candidate pool in their recruitment plans.

Bonuses once again rank as the number one benefit offered by employers, staying steady with 2013 at 42.8 per cent. Bonuses, particularly those directly relating to performance can be a strong motivator.

What is most notable about this year's results is the increase in health plans. Health plans have consistently been ranked second next to bonuses. However, for the first time health plans rank first in North America.

More people are receiving benefits than in the past five years

OVERVIEW OF INDUSTRY BENEFITS



Background: The bar chart shows two figures related to benefits that employees in the oil and gas industry receive. The first figure represents the percentage of respondents that receive that particular benefit, i.e. 42.8 per cent of respondents receive some sort of bonus. The second figure represents the value of that benefit stated as a percentage of their overall package for those that receive it, which in the case of bonuses is 15.9 per cent.

INDUSTRY BENEFITS
Company Benefits

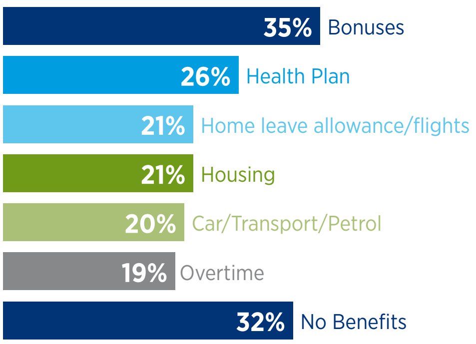
Bonuses top the list as the highest ranked benefit across all company types, staying consistent with 2012. Global Super Majors and Equipment Manufacturer & Supplier companies offer pension plans more so than other company types. On the other hand, EPCM and Oilfield Services offer more overtime pay.

As candidates move within sectors employers should be mindful of the benefits professionals are used to receiving and be flexible with their offerings in order to attract their desired talent.

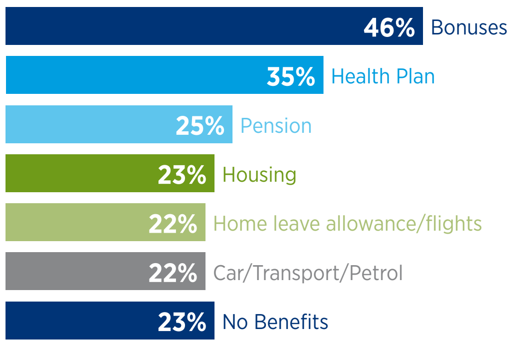
Despite bonuses being the highest ranked benefit across all company types, health plans realised the highest increase of five per cent

TOP BENEFITS BY COMPANY TYPE

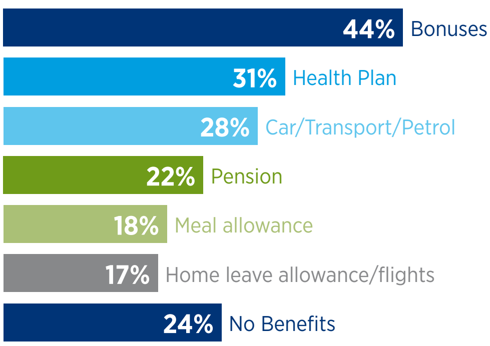
EPCM/CONTRACTOR



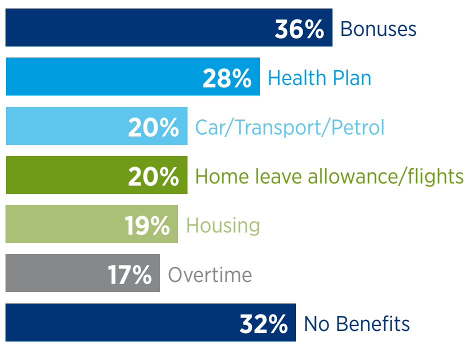
GLOBAL SUPER MAJOR/OPERATOR



EQUIPMENT MANUFACTURER & SUPPLY



OILFIELD SERVICES/CONSULTANCY



INDUSTRY BENEFITS

Regional Benefits

Bonuses are the most popular benefit offered to employees for all regions bar North and South America. In North America in the last year, health plans have taken over the number one spot for most prevalent benefit offered. This could be in response to the recent US 'Obama Care' implementation.

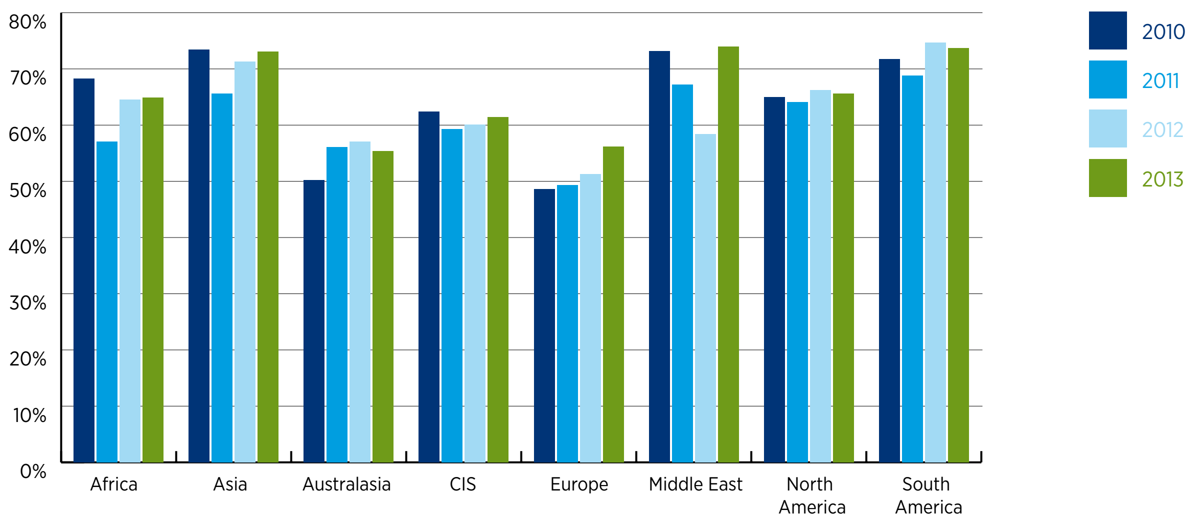
In South America, health plans are again the most popular benefit. South America also has the lowest number of employees who are not receiving benefits.

Australasia, although experiencing a small decline in the number of people receiving benefits, is still above its lowest number in 2010.

The Middle East has seen the highest percentage increase in the number of people receiving benefits, as benefits are offered to >10 per cent more people than in 2013. The number of people receiving benefits in the Middle East currently surpasses the previous high in 2010.

Middle East, Asia and South America are the regions with the fewest number of oil and gas professionals without benefits

PERCENTAGE OF EMPLOYEES WHO RECEIVE BENEFITS BY REGION



INDUSTRY BENEFITS

Regional Benefits

TOP BENEFITS BY REGION

AFRICA

- 37% Bonuses
- 31% Health Plan
- 26% Car/Transport/Petrol
- 25% Housing
- 24% Home leave allowance/flights
- 22% Meal allowance
- 29% No Benefits

ASIA

- 48% Bonuses
- 34% Health Plan
- 27% Car/Transport/Petrol
- 25% Housing
- 23% Home leave allowance/flights
- 20% Overtime
- 23% No Benefits

AUSTRALASIA

- 30% Bonuses
- 19% Pension
- 15% Health Plan
- 12% Home leave allowance/flights
- 11% Car/Transport/Petrol
- 9% Training
- 44% No Benefits

EUROPE

- 33% Bonuses
- 25% Pension
- 21% Health Plan
- 15% Car/Transport/Petrol
- 10% Overtime
- 10% Meal allowance
- 39% No Benefits

MIDDLE EAST

- 41% Bonuses
- 33% Home leave allowance/flights
- 33% Housing
- 31% Health Plan
- 26% Car/Transport/Petrol
- 16% Meal allowance
- 23% No Benefits

NORTH AMERICA

- 39% Health Plan
- 36% Bonuses
- 21% Pension
- 16% Car/Transport/Petrol
- 16% Overtime
- 12% Training
- 29% No Benefits

RUSSIA AND CIS

- 30% Bonuses
- 24% Health Plan
- 23% Home leave allowance/flights
- 20% Housing
- 18% Meal allowance
- 16% Car/Transport/Petrol
- 35% No Benefits

SOUTH AMERICA

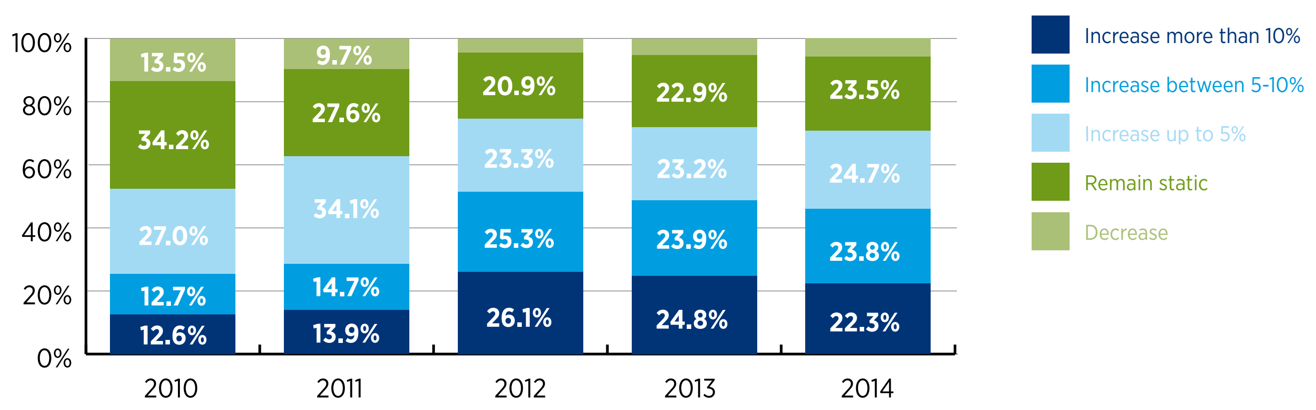
- 46% Health Plan
- 40% Bonuses
- 25% Meal allowance
- 19% Car/Transport/Petrol
- 18% Pension
- 17% Training
- 22% No Benefits

SECTION FOUR
INDUSTRY EMPLOYMENT

Plans for increasing staffing levels stays consistent with 2012

>70 per cent of employers plan to increase headcount in 2014

CONFIDENCE THAT STAFFING LEVELS WILL CHANGE IN THE NEXT 12 MONTHS



INDUSTRY EMPLOYMENT
Staffing Levels

Projected headcount growth remains on par with the previous two years. We have seen three years of consistently optimistic expectations of headcount growth, indicative of the relevant confidence in the industry.

In 2013 there was a slight dip in the number of employers planning to increase their headcount by more than 10 per cent, reaffirming that employers are setting realistic expectations for increases in the headcount.

The industry continues to rely heavily on contract workers and companies expect this to continue and perhaps increase in the future.

AREAS IN WHICH CONTRACTORS ARE EMPLOYED IN OIL AND GAS

	Always	Sometimes	Never
Subsea & Pipelines	45.4%	37.9%	16.6%
Drilling & Well Delivery	37.1%	36.3%	26.5%
Engineering & Design	40.4%	46.1%	13.5%
Equipment & Supply	45.9%	38.9%	15.1%
Geoscience & Petroleum Engineering	27.7%	44.6%	27.7%
HSE & QAQC	33.6%	43.6%	22.8%
Operations, Maintenance & Production	38.1%	43.1%	18.8%
Petrochemicals	28.7%	40.9%	30.4%
Project Controls	34.1%	43.2%	22.7%

On average, companies rely less on expat workers than in 2012

PERCENTAGE OF STAFF EMPLOYED ON A TEMPORARY OR CONTRACT ASSIGNMENT IN 2013

41.4%	More than 20%
34.1%	Between 5-20%
12.0%	Up to 5%
12.5%	None

PERCENTAGE OF WORKFORCE EMPLOYED AS AN EXPAT IN 2013

33.9%	More than 10%
22.9%	Between 5-10%
21.8%	Up to 5%
21.4%	None

EXPECTATION THAT CONTRACTOR LEVELS WILL CHANGE IN THE NEXT 12 MONTHS

41.6%	40.5%	17.9%
Increase	Remain the same	Decrease

EXPECTATION THAT EXPAT LEVELS WILL CHANGE IN THE NEXT 12 MONTHS

43.8%	48.7%	7.6%
Increase	Remain the same	Decrease

INSIGHT INTO GENERATION Y

A new generation has arrived and is now embedded in the world of work. Generation Y (Gen Y) – those born between 1983 and 1995 – now represent a significant and increasing percentage of the global labour market. As the Baby Boomers and Gen X start to leave the workforce, this generation will take over the reigns and be responsible for leading the worldwide economy.

Research recently conducted by Hays sheds some light on Gen Y's attitudes to issues surrounding their work and careers: what attracts them to a potential employer and what makes them stay such as reward, training and work/life balance; what they look for in an ideal boss; what they regard as key indicators of career success; and how they relate to social media and emerging technology.

It's probably not surprising that our research shows that Gen Y across the globe differs from prior generations in terms of their needs and aspirations in the workplace. By and large, they look for a more engaging employee value proposition than prior generations, and value flexibility in when and where they work.

However, our research also shows that Gen Y differs considerably from region to region and from country to country. For instance, while all Gen Y's want to be compensated appropriately, wealth creation is much more important to those in China than Gen Y in the UK or US where work/life balance and job satisfaction are equally important.

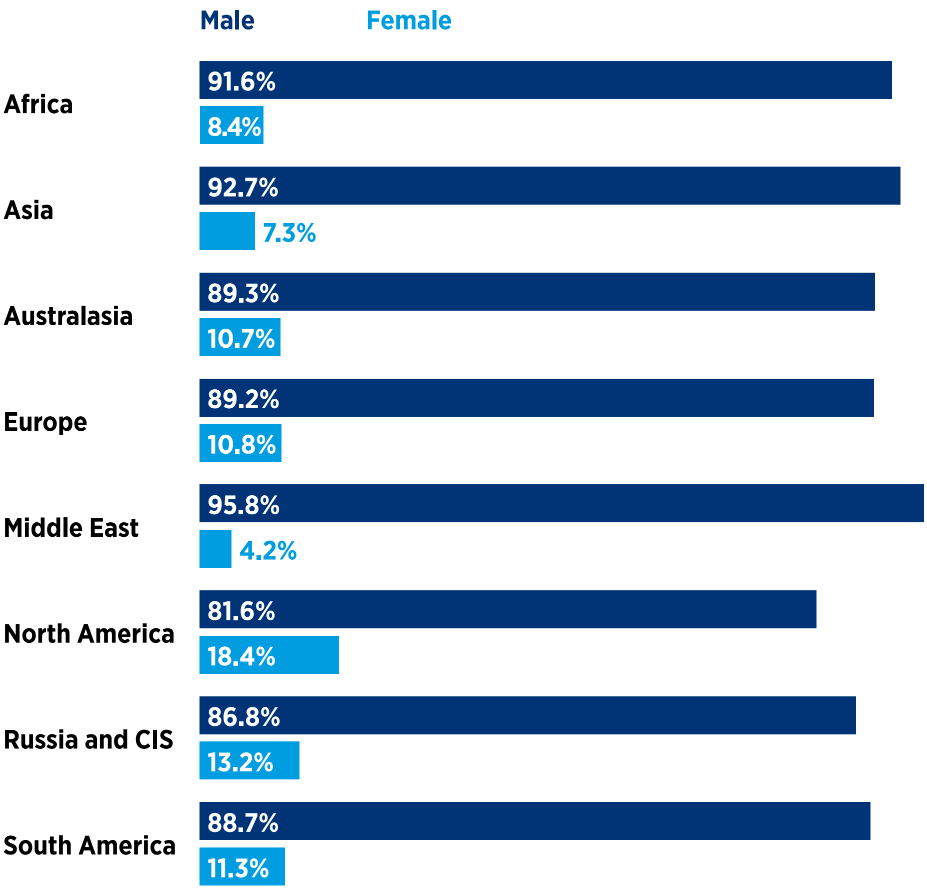
In contrast, Gen Y in Japan view job security as the most important indicator of career success. Gen Y in the US are more motivated by making a difference to society than any other country surveyed, whereas Gen Y UK are the most motivated by interesting work and coming up with solutions, and workers in China value public recognition.

In terms of an ideal boss, Gen Y in the UK and US seek coaching, mentoring and leadership, whereas in China and Japan they are more interested in their boss being a confidant and an allocator of work.

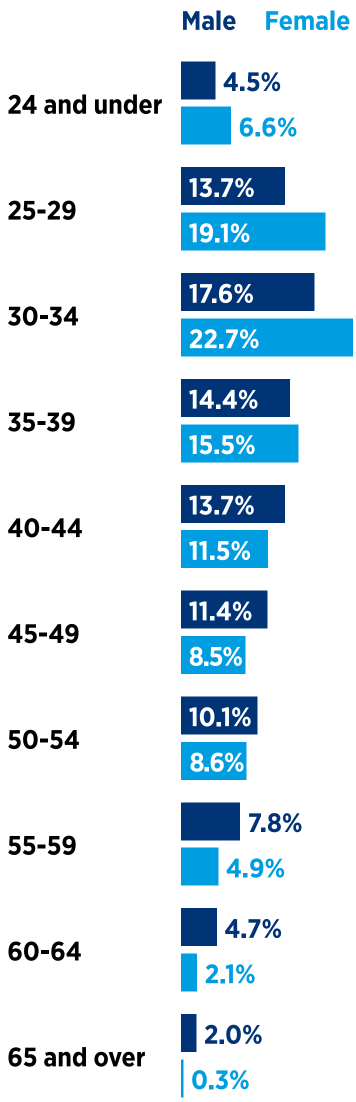
In the oil and gas industry, the aging workforce and the increasing demand for highly skilled professionals has created skills shortages in many disciplines and in many parts of the world. In fact, our survey shows that skills shortages are now the most important issue facing companies today. Gen Y workers will play an increasingly important role in solving the industry's skill shortages. Therefore it is critical for companies and their HR departments to understand what motivates Gen Y so that they can most effectively attract, motivate and retain them.

DIVERSITY OF STAFF

REGIONAL GENDER DIFFERENCES



AGE DEMOGRAPHICS



Women and younger workers make up more of the oil and gas industry workforce than last year

INDUSTRY EMPLOYMENT

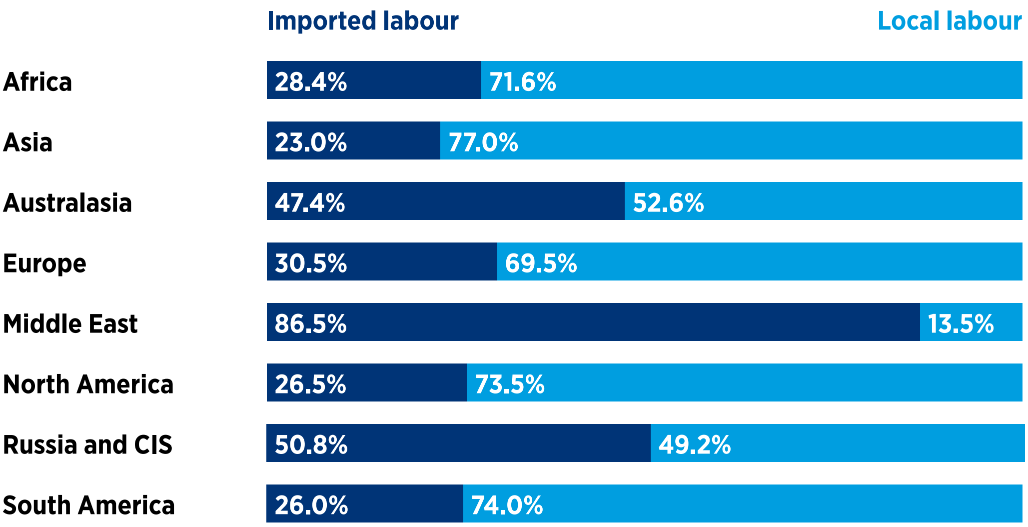
Diversity and Movement of Workforce

WORKING AT HOME OR ABROAD

Middle East dominated by expatriates

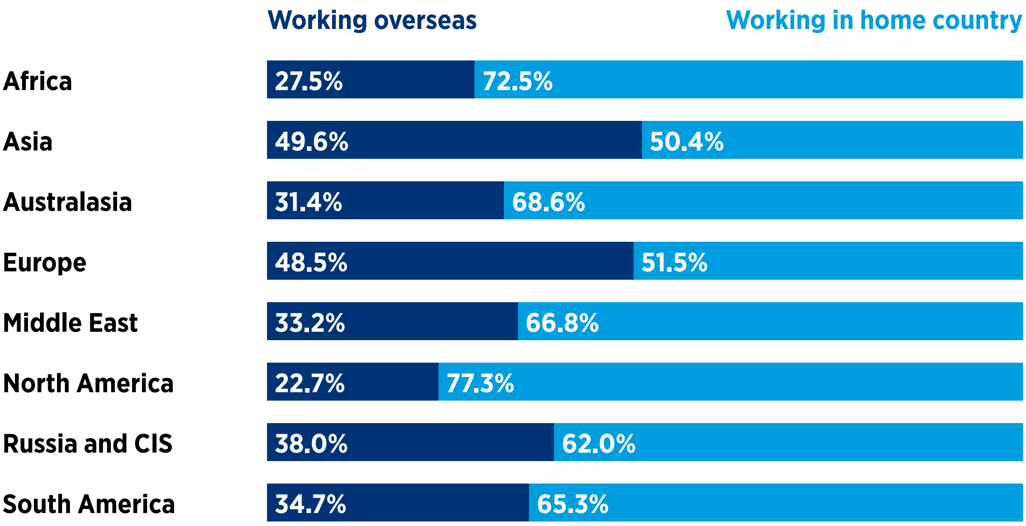
MOVEMENT OF THE WORKFORCE

IMPORTED WORKFORCE VERSUS LOCAL WORKFORCE



Europe and Asia remain the primary export of talent

WORKING OVERSEAS VERSUS WORKING IN HOME COUNTRY



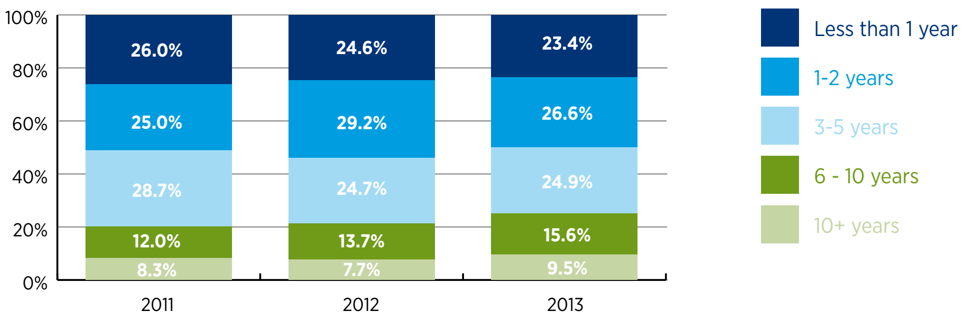
INDUSTRY EMPLOYMENT

Experience and Tenure

This year has seen a significant increase in the number of workers new to the industry as companies are hiring more college graduates as well as experienced workers to join their business from other industries. However, years of experience of professionals within their current roles have largely stayed the same with previous years.

With the baby boomer generation nearing retirement we could see an exodus of professionals leaving the industry with vast knowledge and skill sets. Employers can address this impending issue with appropriate training and succession planning.

TIME IN CURRENT ROLE



YEARS OF EXPERIENCE IN THE OIL AND GAS INDUSTRY

35.6% 0-4 years

23.1% 5-9 years

21.7% 10-19 years

19.5% 20+ years

YEARS OF EXPERIENCE FOR SPECIFIC DISCIPLINE AREAS

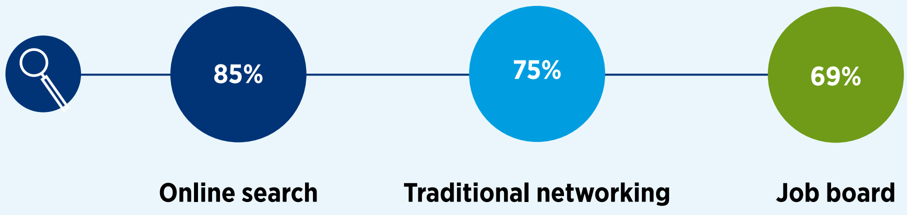
	0-4 years	5-9 years	10-19 years	20+ years
Construction/ Installation	16.2%	26.4%	36.0%	21.4%
Geoscience	24.7%	24.7%	26.5%	24.1%
Project Controls	19.0%	30.1%	23.0%	27.9%
Subsea/ Pipelines	29.8%	21.4%	22.4%	26.5%

INDUSTRY EMPLOYMENT

Recruiting in the Digital Space

THE RISE OF ONLINE JOB BOARDS FOR JOB SEEKERS

The following chart indicates the top three ways in which oil and gas professionals find new jobs. Recruiting in the digital age means employers need to cover all basis, having their jobs posted on multiple channels, so that job seekers can easily navigate the job market.



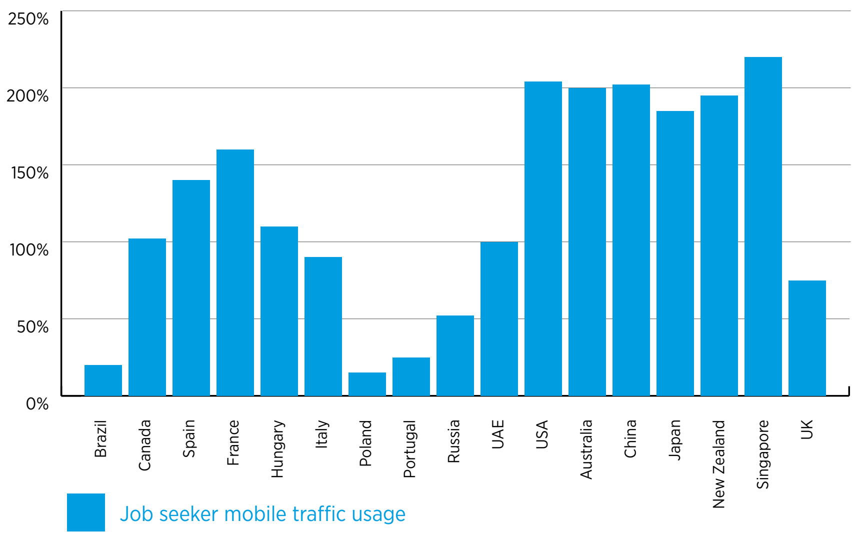
Source: Study by Oil and Gas Jobsearch

MOBILE RECRUITING

Social media is obviously an important space to be in when targeting job seekers. In addition to this however, recruiting in the digital space means reaching your audiences when and where they are available and there may be no better direct route then mobile technology. In a recent iMomentous report, 36 per cent of Fortune 500 companies have a mobile website, yet only five per cent permit applying via mobile capabilities. A Simply Hired survey found that mobile users click on 60 per cent more jobs and spend 27 per cent more time looking at jobs. By not having your jobs in a mobile environment could result in employers missing out on active candidates.

65 per cent of Hays countries have experienced between 100 and 200 per cent+ increase in job seeker mobile traffic compared to last year

% INCREASE IN HAYS JOB SEEKER MOBILE TRAFFIC 2012 VS 2013



INDUSTRY EMPLOYMENT
Employment Mix

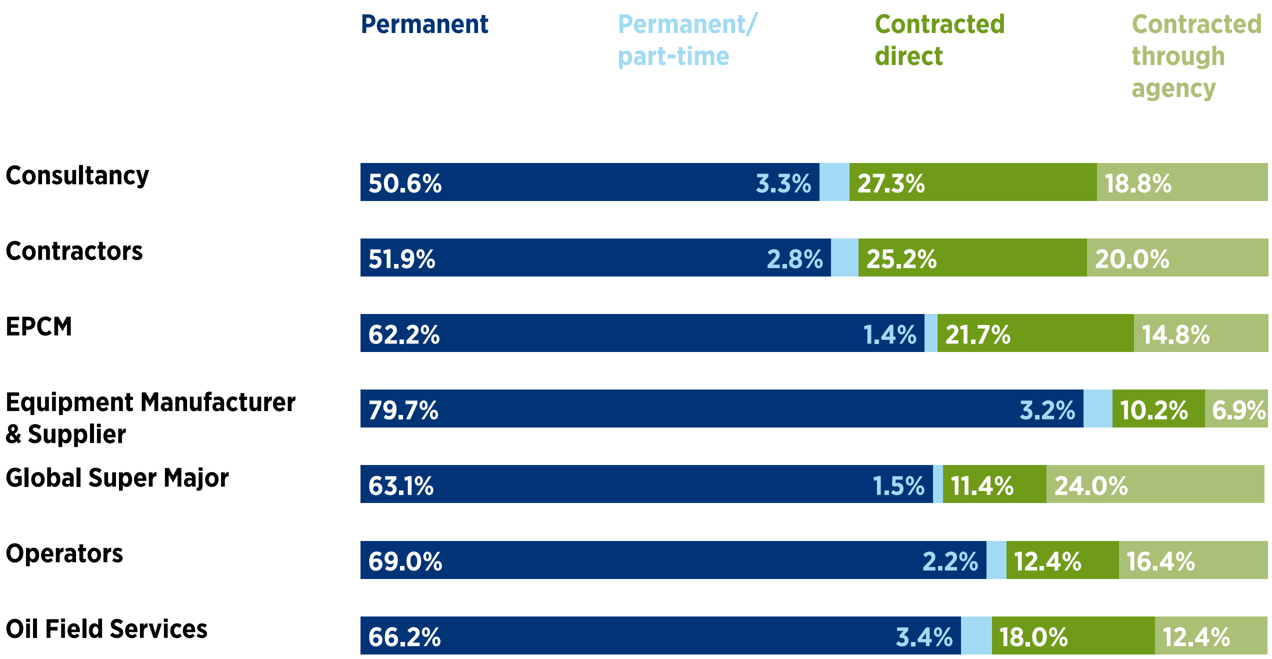
Permanent hiring is at an all-time high compared to the results of our past four salary guides. Areas where we are seeing the highest spike in permanent staff levels are Global Super Majors and Operators. Both of which are up by approximately 10 per cent compared to 2012.

Of note, Equipment Manufacturer & Suppliers were the only company type to experience flat or declining percentages of permanent workers. However, their permanent workforce percentage remains the highest out of all company types.

Permanent hiring on the rise

Fewer contractors were engaged with agencies

EMPLOYMENT MIX BY COMPANY TYPE

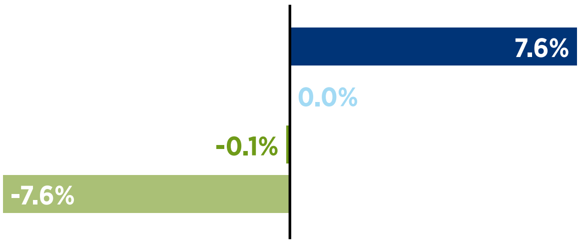


INDUSTRY EMPLOYMENT
Employment Mix

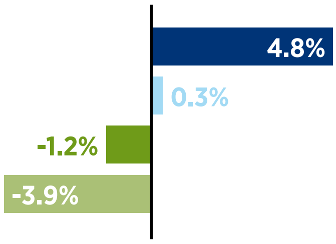
PERCENTAGE CHANGE OF EMPLOYMENT TYPE FROM 2012 to 2013

Permanent | **Permanent/part-time** | **Contracted direct** | **Contracted through agency**

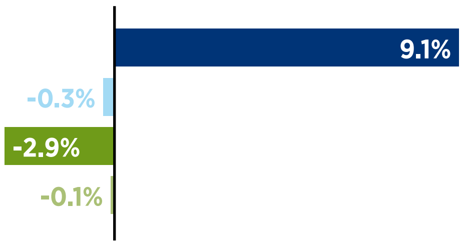
CONSULTANCY



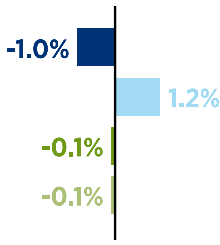
CONTRACTORS



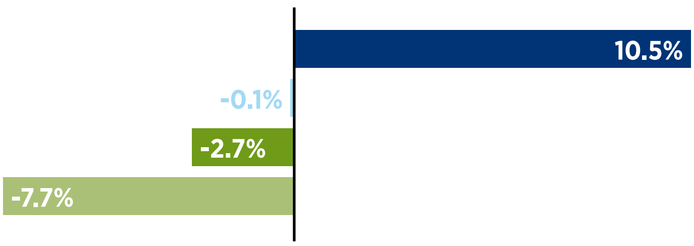
EPCM



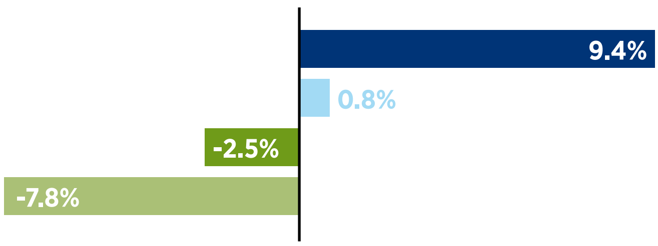
EQUIPMENT MANUFACTURER & SUPPLIER



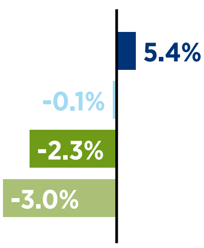
GLOBAL SUPER MAJOR



OPERATORS



OIL FIELD SERVICES

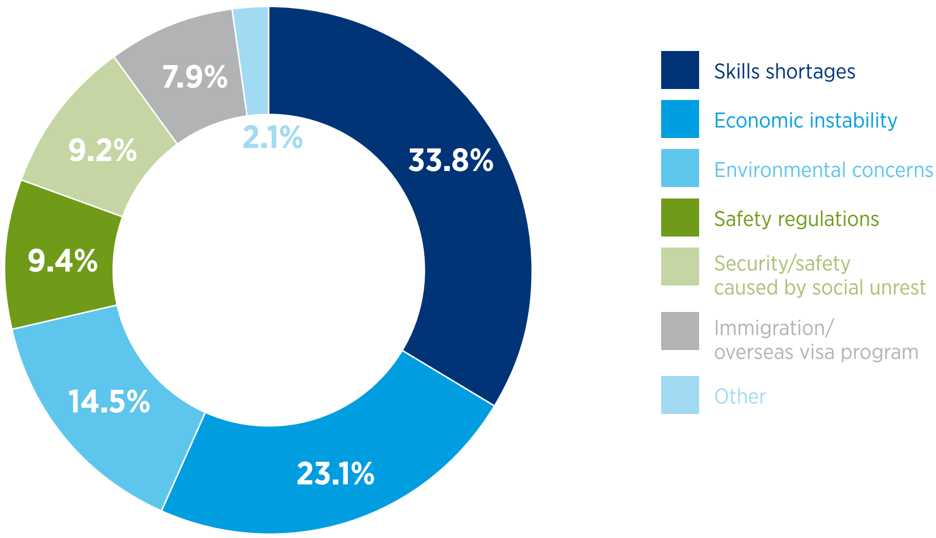


SECTION FIVE
INDUSTRY OUTLOOK

Long-term view is relatively strong, particularly for high potential areas such as Brazil, the Gulf of Mexico, West Africa and the Arctic

Skill shortages continue to be the main concern for employers worldwide

EMPLOYERS' CONCERNS IN THE CURRENT EMPLOYMENT MARKET



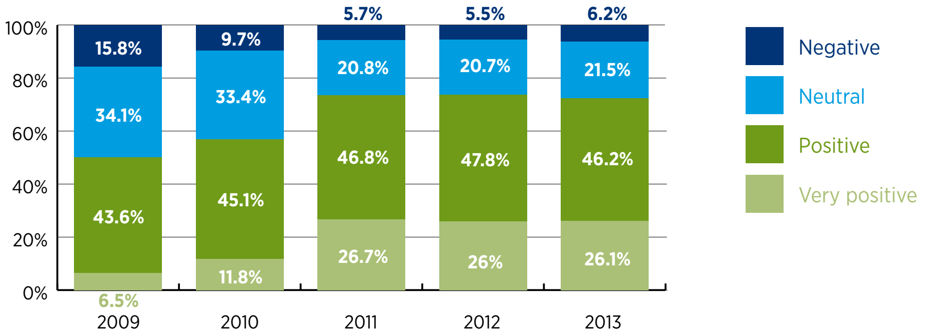
INDUSTRY OUTLOOK
Confidence and Concerns

For the past three years employers have had a consistently positive outlook on the industry. Over 70 per cent of employers have a positive to very positive outlook moving into 2014. Despite this positivity there are still many factors that could impede on employers plans for growth. For example, in South America and Australasia, approximately a third of employers are concerned with economic instability and in North America, 40 per cent are concerned with skill shortages. In Africa economic instability is equally as concerning as the potential of environmental issues. Safety regulations remain an important concern here as well.

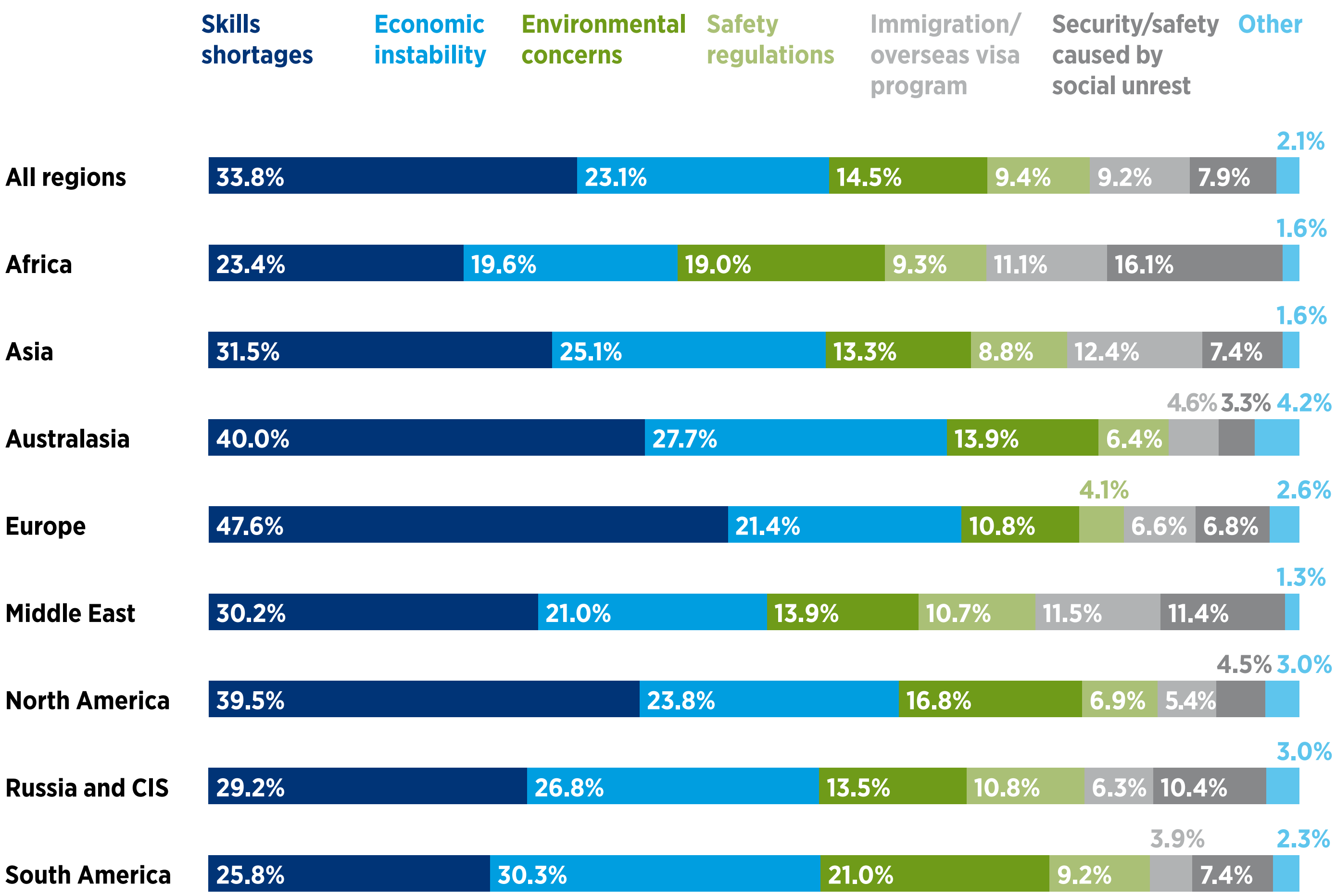
Skill shortages worldwide still plague the industry, however immigration and overseas visa programs are less concerning to employers. Expect competition on a global level for top talent as business activity gains strength throughout 2014.

> “Confidence levels in next year’s industry growth remain high but have declined slightly from last year, reflecting the caution that has crept into the industry.”
>
> *John Faraguna, Managing Director, Hays Oil & Gas*

EMPLOYERS’ CONFIDENCE IN THE OIL & GAS INDUSTRY



EMPLOYERS’ CONCERNS IN THE CURRENT EMPLOYMENT MARKET



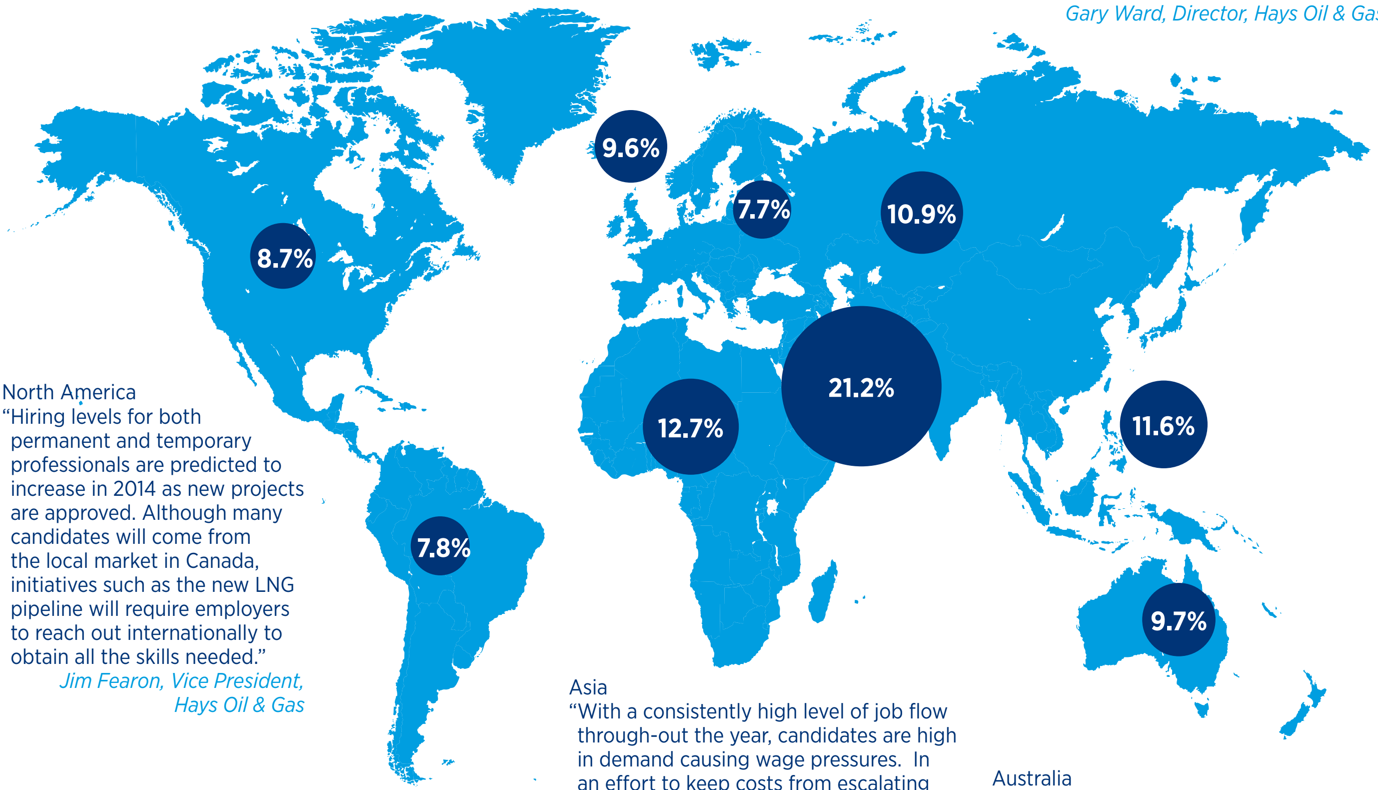
INDUSTRY OUTLOOK

Focus for 2014

EMPLOYER'S GEOGRAPHICAL FOCUS OVER THE NEXT 12 MONTHS, OUTSIDE THEIR OWN REGIONAL AREA

North Sea
"Geoscience and subsurface professionals are in high demand due to an emergence of projects over the last 12 months. These candidates with North Sea specific development experience are in particular short supply as they are typically recruited for projects overseas. Employers in 2014 should plan ahead their recruitment plans in order be prepared for this shortage."
Ed Allnutt, Director, Hays Oil & Gas

Middle East
"We have seen strong business activity in 2013, and as planned projects come on-line, we expect the Middle East to be a hive of recruitment of activity over the next year. The labour market is forecast to remain stable for local candidates but increase for imported talent, as employers look to overseas to source the skills needed to support major projects planned for 2014."
Gary Ward, Director, Hays Oil & Gas

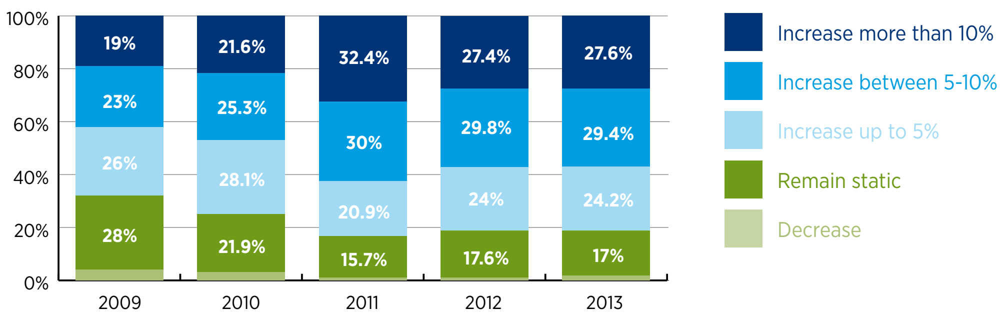


North America
"Hiring levels for both permanent and temporary professionals are predicted to increase in 2014 as new projects are approved. Although many candidates will come from the local market in Canada, initiatives such as the new LNG pipeline will require employers to reach out internationally to obtain all the skills needed."
Jim Fearon, Vice President, Hays Oil & Gas

Asia
"With a consistently high level of job flow through-out the year, candidates are high in demand causing wage pressures. In an effort to keep costs from escalating employers are utilising bonuses to keep base salaries in check. We anticipate much of the same for 2014."
Mike Wilkshire, Director, Hays Oil & Gas

Australia
"With portions of the market remaining flat over 2013, employers are looking to exhaust local resources before they will consider sponsorship. Key technical areas and skillsets specific to new technology like FLNG and dynamic positioning are new to Australia however, and as such, employers are looking to overseas markets for resources."
Paula Kirwan, Director, Hays Oil & Gas

EXPECTED SALARY CHANGES IN THE NEXT 12 MONTHS



ABOUT HAYS

COUNTRIES WORLDWIDE	33
OFFICES WORLDWIDE	239
STAFF WORLDWIDE	7,840
PERMANENT CANDIDATES PLACED LAST YEAR	53,000
PEOPLE PLACED INTO TEMPORARY ASSIGNMENTS LAST YEAR	182,000

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