

Energy Spot Poll #3

2021 HR planning & flexible working

Global Results
September 8-16, 2020



Energy industry¹ challenges due to COVID-19 and volatile oil prices set to continue deep into 2021

This is the third global piece of original research conducted by Mercer's Energy Vertical in 2020. Our online poll was conducted between September 8-16, 2020 and reflects input from **220 company participants** from across the global energy value chain.

While the focus of our previous two polls in March and April centered around immediate actions energy companies were considering and taking amidst the pandemic and unprecedented low oil prices, our third energy poll pivots to 2021 and the **emerging HR priorities** and views on **scaling flexible working**.

The emerging HR priorities for 2021 reflect the realities of working in a global pandemic. The top priorities included: **driving improved productivity & efficiency, managing mental health & employee wellbeing** and **returning to worksites post COVID-19**.

Despite the economic challenges facing the industry, survey participants in September reported they expected a **slightly higher level of employee engagement** at the end of 2020 than when Mercer last asked the question in April.

Many energy organizations are working through whether to or how to implement flexible working at greater scale. For those considering flexing at scale, the top driver was **employee engagement & productivity**. The top obstacle to achieving flexibility at scale? **Leader and manager attitudes to managing flexible working**. We anticipate flexible working being a hot topic of conversation in boardrooms across the industry heading into 2021.

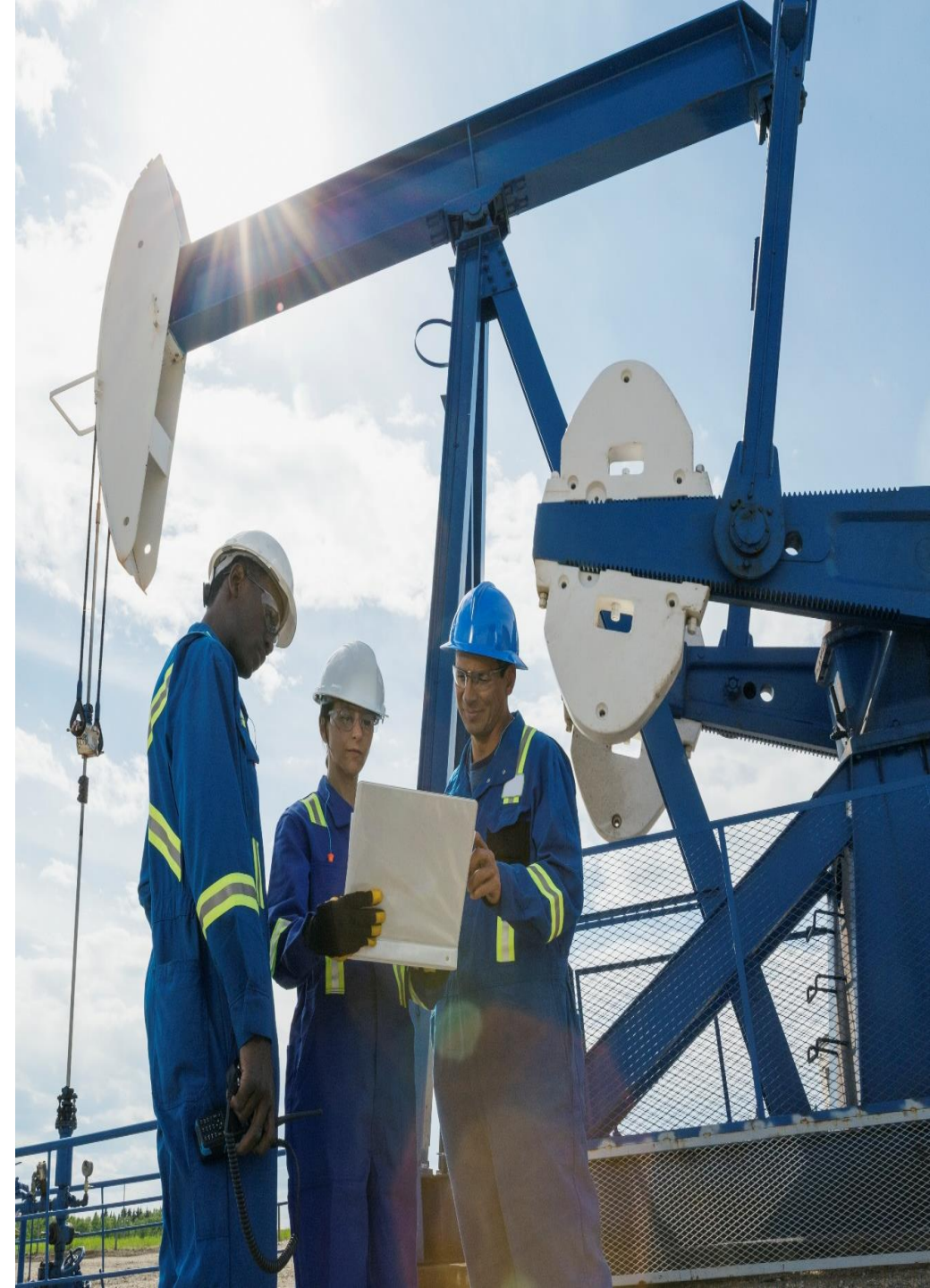
Mercer's Energy Vertical strives to continue to provide industry-leading data and insights geared towards helping our clients comprehend critical factors and trends transforming the energy industry and its workforce. To receive earlier Energy Vertical spot poll results, or to request regional and/or industry segment cuts of this data, please contact your local Mercer consultant.

Milan Taylor, Partner
Mercer Global Energy Leader



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¹ Note this summary overview reflects composite energy results globally across O&G, Chemicals, Mining, Utilities & Renewables. Different regions and industry segments and sub-segments reported significantly contrasting results.



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Global Participant Profile (220 Total) – Page 1 of 3

ADNOC	B2Gold Corp	Chesapeake Energy	DNV GL
AECI Limited	Baker Hughes	Chevron Corporation	Dragon Oil
AES Chivor	BHP	Cimarex Energy	Dril-Quip
AESO	Borouge	Civeo	Edge OFS
Aker Solutions	Borr Drilling	CNOOC Petroleum	Emdad Group
Al Ghurair Investment	BP Singapore	Codensa	Emerson
Alkhorayef Petroleum Colombia	Cairn Energy	ConocoPhillips	Emgesa
APA Group	Calfrac Well Services	Consolidated Contractors Engineering	Empresas Gasco
Apache Corporation	Callon Petroleum Company	Consolidated Minerals	Enable Midstream Partners
Arabian Drilling Company	Calpine Corporation	Continental Resources	Enap
Aramco	Cameco Corporation	Crescent Petroleum	Endeavor Energy Resources
Aramco Americas	CAPP	Crescent Point Energy	Enel Green Power
ARB Midstream	Capstone Mining Corp.	CVR Energy	Enerflex Ltd.
ARC Resources	Cenovus Energy	Descon Engineering Limited	Enerplus Corporation
Arch Resources	C-FER Technologies	Devon Energy	EnerVest
ARO Drilling	CGG	Diamond Offshore Drilling	Engie
Ascent Resources Management Services	ChampionX	DistributionNOW	ENMAX
	Cheniere Energy	DNOW Canada ULC	Ensign Energy Services

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Global Participant Profile (220 Total) – Page 2 of 3

EP Energy
EPCOR
Epiroc
Equinor
Equion Energia Limited
Equitrans Midstream
Fieldwood Energy
Forum Energy Technologies
Frank's International
Frontera Energy
Fugro
Genel Energy
Gibraltar Mines Ltd.
Gibson Energy
Goodnight Midstream
Granger
Halliburton
Halliburton Argentina SRL

Hess Corporation
HighPoint Resources
Hilcorp Energy
Huntsman
Husky Energy
Iluka Resources
Inyang
Itochu Petroleum Co.
Jadestone Energy
Keyera
Kingston Midstream
Lamprell Energy
Liberty Utilities
LOOP LLC
LSPI
LyondellBasell
Magnolia Oil & Gas
Marathon Oil

MB HOLDING
MedcoEnergi
Merit Energy
Methanex
Metorex
Murphy Oil
Nabors Drilling
Nalcor Energy
National Oilwell Varco
Newmont
NextTier OFS
Nigeria LNG Limited
North West Redwater Partnership
NOV
NuStar Energy
Nutrien Ltd
NuVista
Obsidian Energy

Ocean Installer
Oceaneering, Int'l
OCENSA
Oil Search (Alaska), LLC
Oiltanking
ONEOK, Inc.
OQ
ORAZUL ENERGY
Ovintiv Inc.
Pampa Energía
Pan American Energy
Paramount Resources Ltd.
Parex Resources
Parkland Corporation
Pembina Pipeline
Penspen
Pertamina
PetroChina Canada

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Global Participant Profile (220 Total) – Page 3 of 3

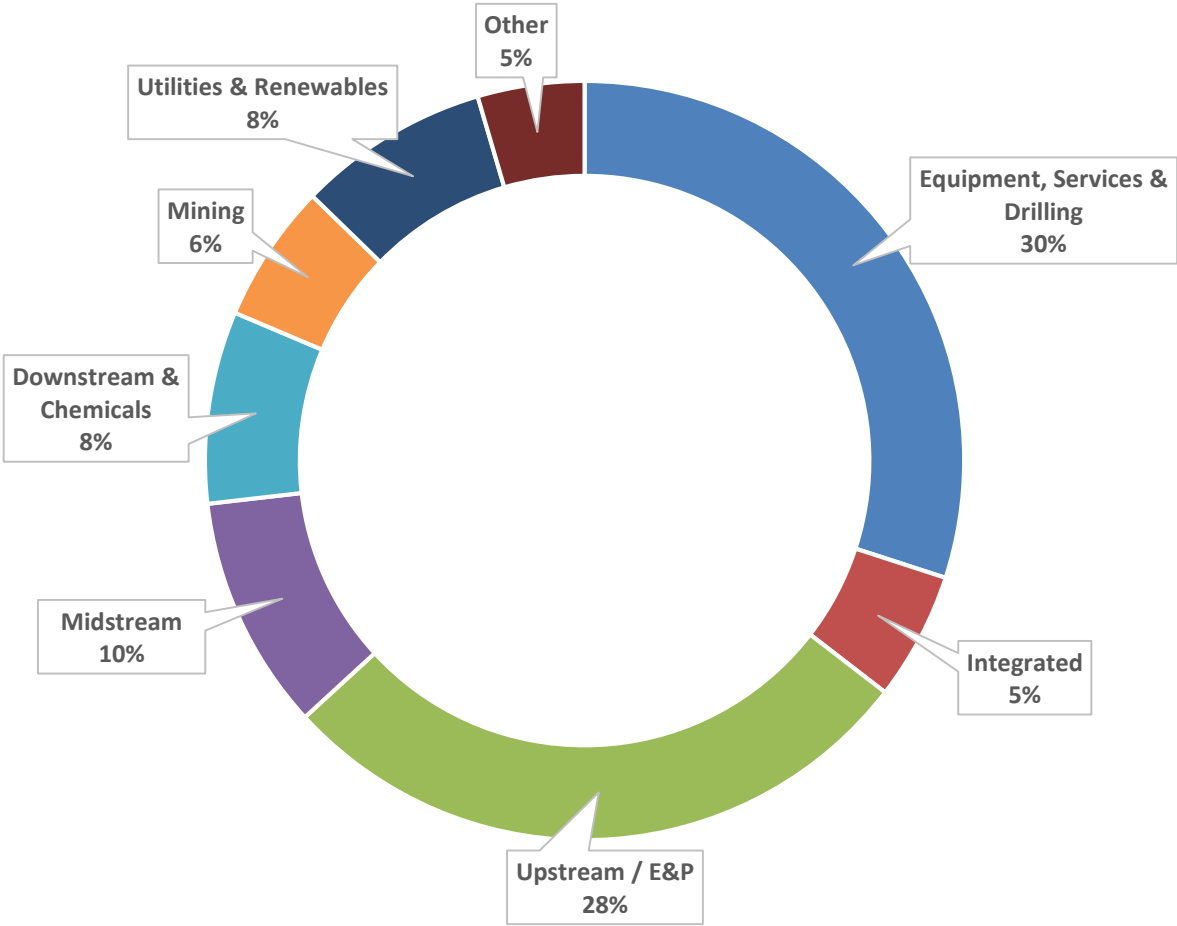
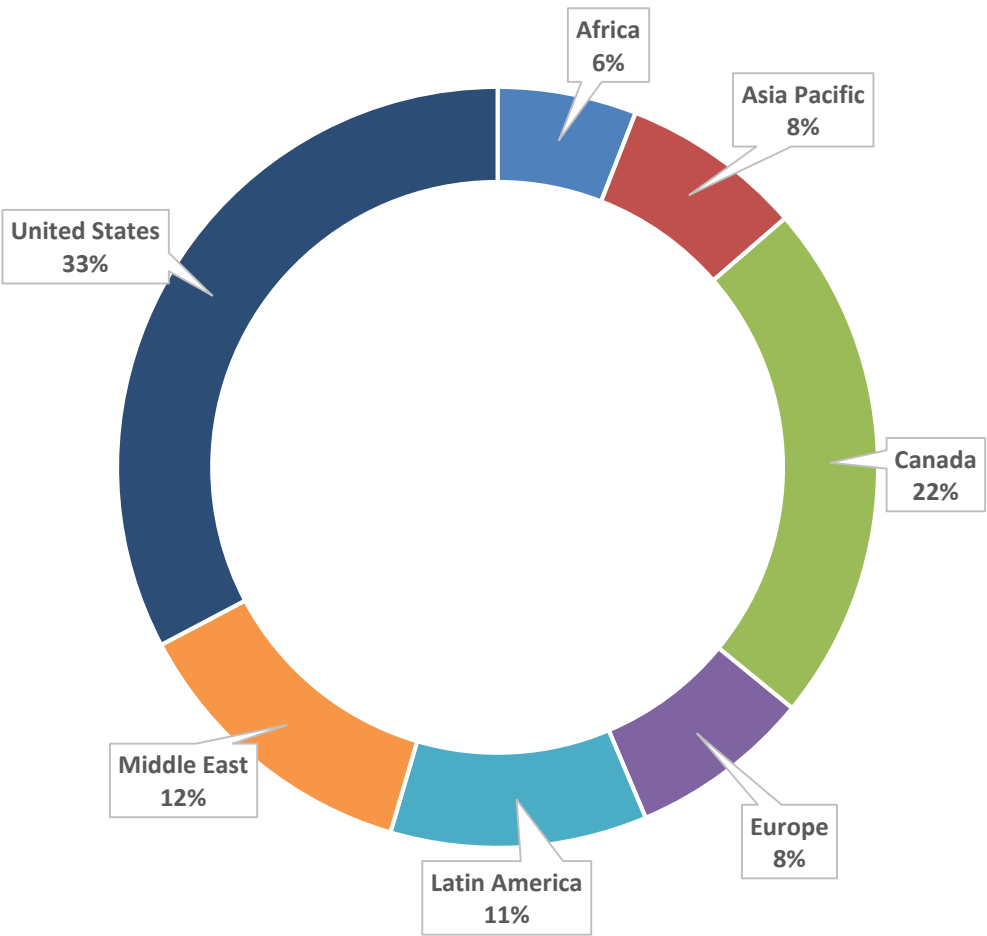
Petrogas EP
Phillips 66
Plains All American
Pluspetrol
Prairie Provident Resources Canada
Propak Systems
Prosafe Offshore Limited
Qatargas
QEP Resources
Range Resources
Renew Power
Rockpoint Gas Storage
Rockwell Automation
Royal Dutch Shell
Ruashi Mining
Saipem
SANAD
Sasol
Saudi Arabian Saipem

Scatec Solar
Schlumberger
Seadrill
SECURE Energy
SERTECPET S.A.
Seven Generations Energy
Shelf Drilling
Shoreline Natural Resources Limited
Siemens Energy
SMFG - Euronimba
SNC LAVALIN
Southwestern Energy
Sproule
Storm Resources
Surge Energy
Syncrude Canada
TAQA
TC Energy
TechnipFMC

Tellurian Inc.
Tenaris
Tervita
TPC Group
Trans Mountain Canada
Tuboscope Vetco de Argentina SA
UFA
Valaris
Vesta Energy Ltd.
Vista Oil & Gas
Vivo Energy
Water Corporation
Wellbore Integrity Solutions
West African Gas Pipeline Co.
Westlake Chemical
Wood
Worley
WPX Energy

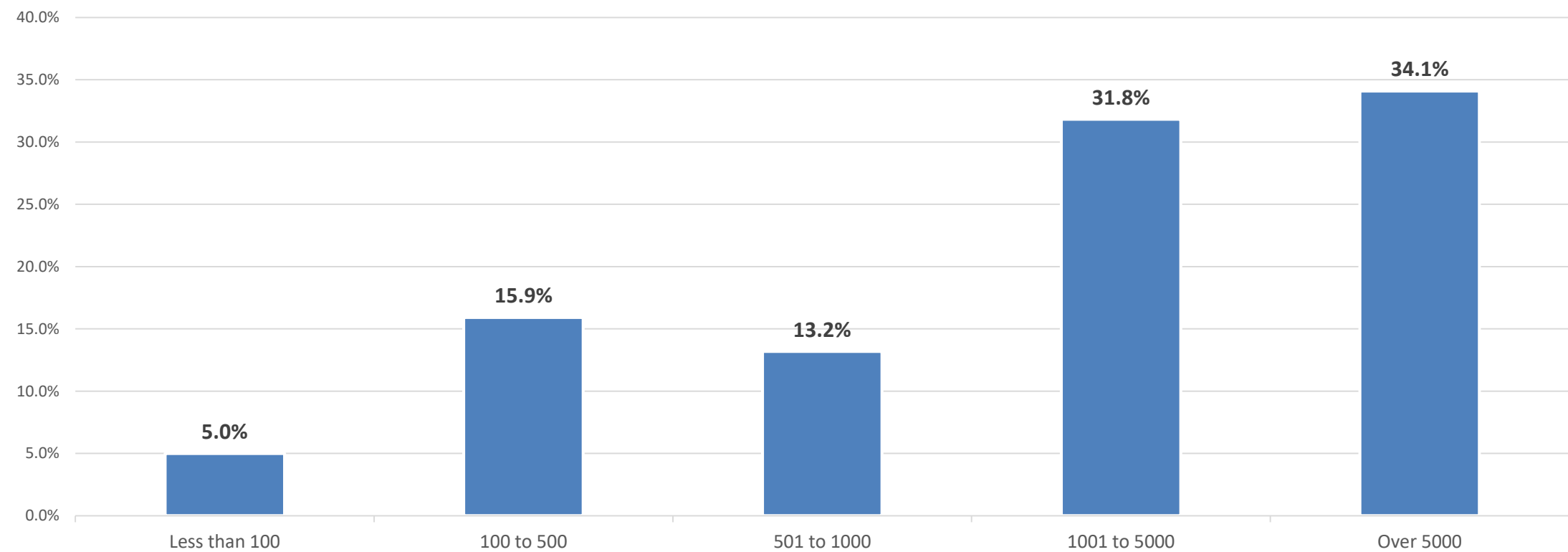
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Geographic & Industry Sector Representation



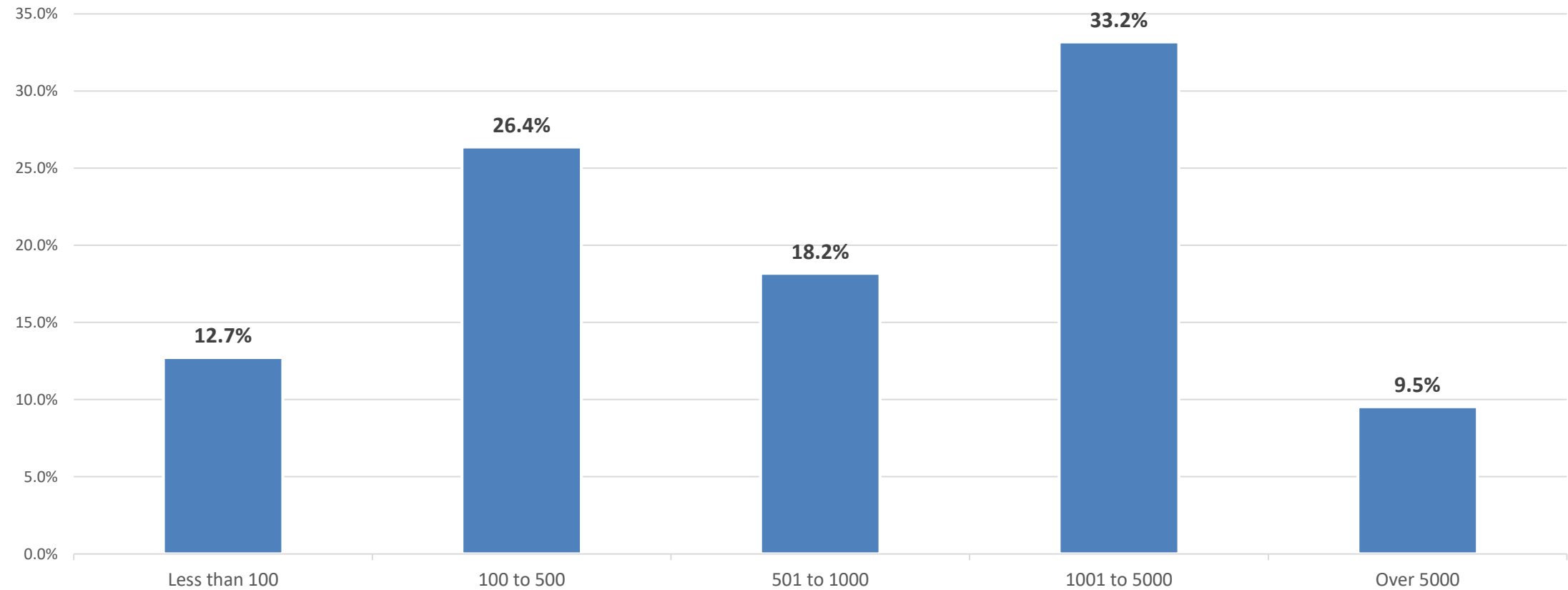
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Company Size Representation (Global Headcount)



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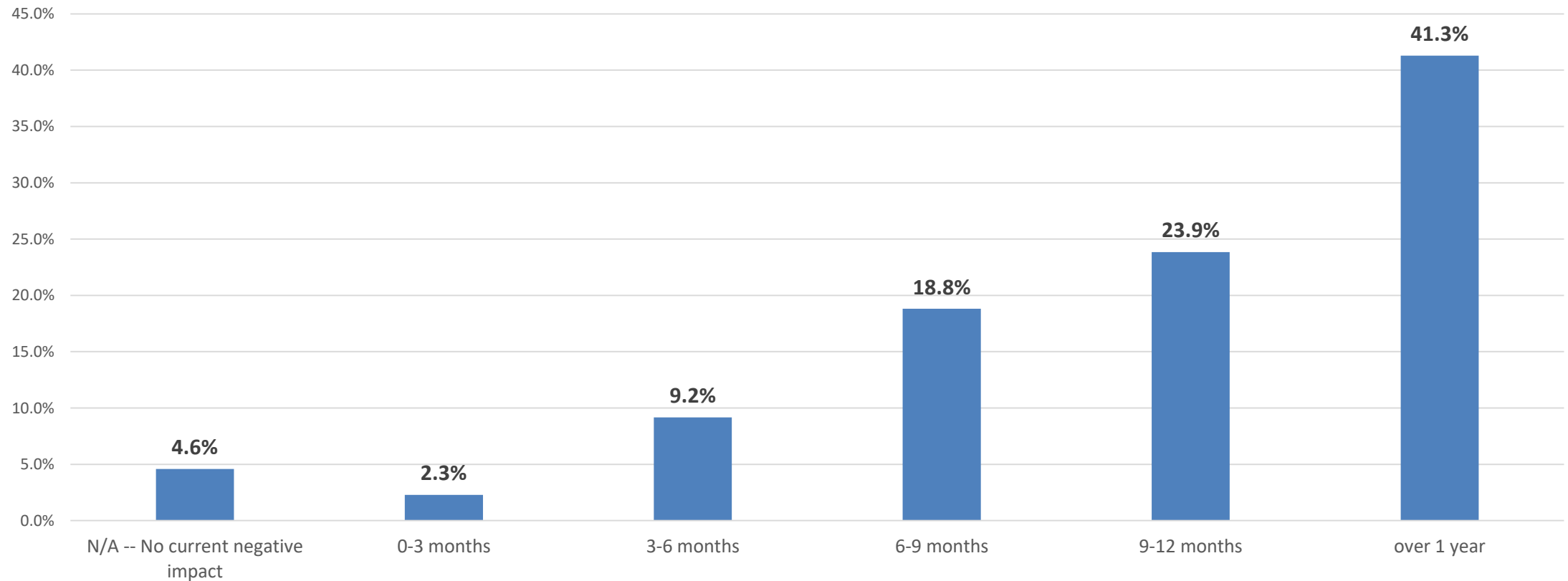
Company Size Representation (Local Country* Headcount)



*Company headcount in the country of the survey respondent

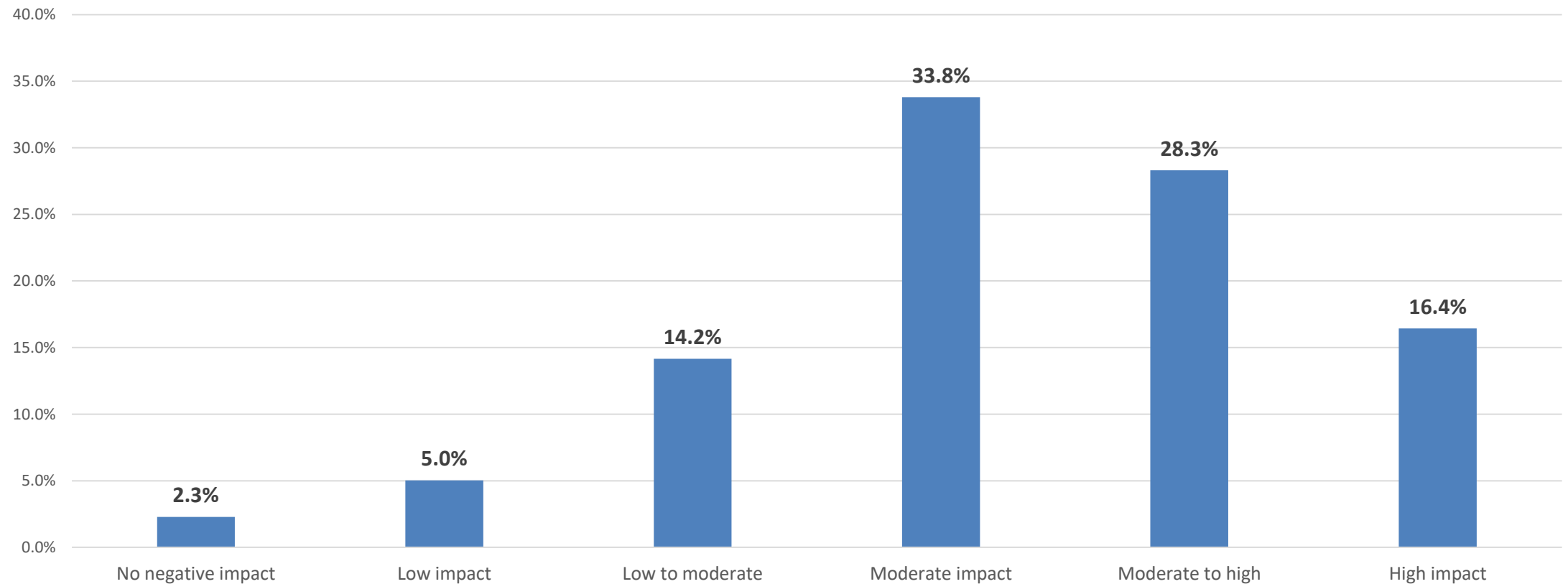
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How much longer do you expect the economic impact of COVID and low/volatile oil prices will negatively impact your organization?



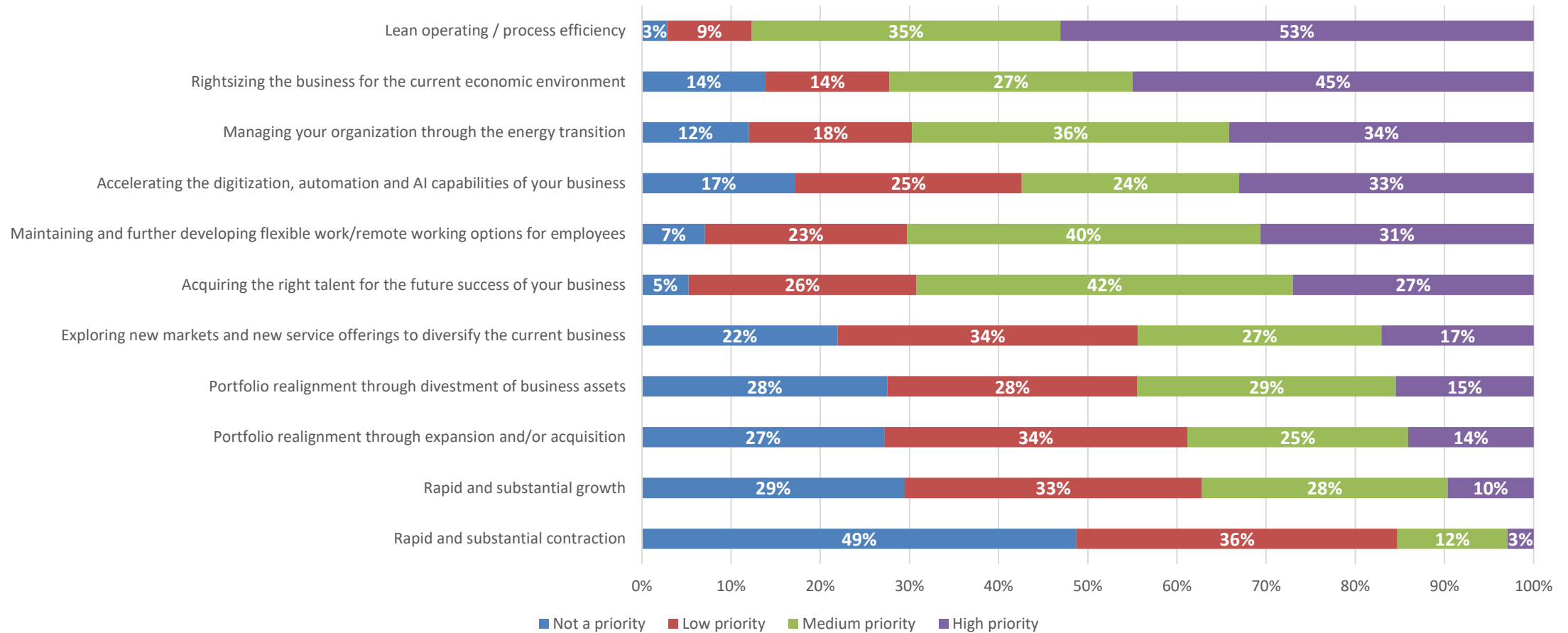
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To what extent do you expect the economic impact of COVID and low/volatile oil prices will negatively impact your company's 2021 financial performance?



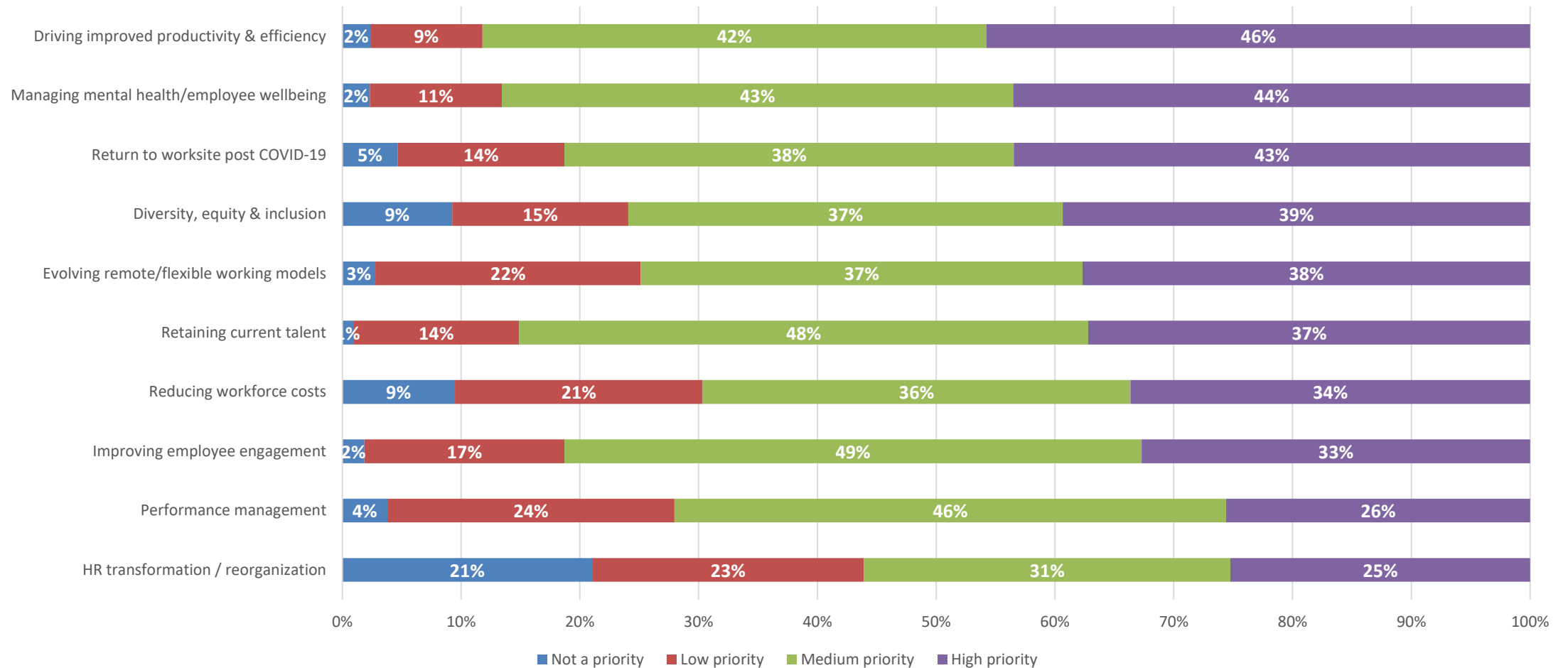
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Please share your business strategy priorities for 2021:



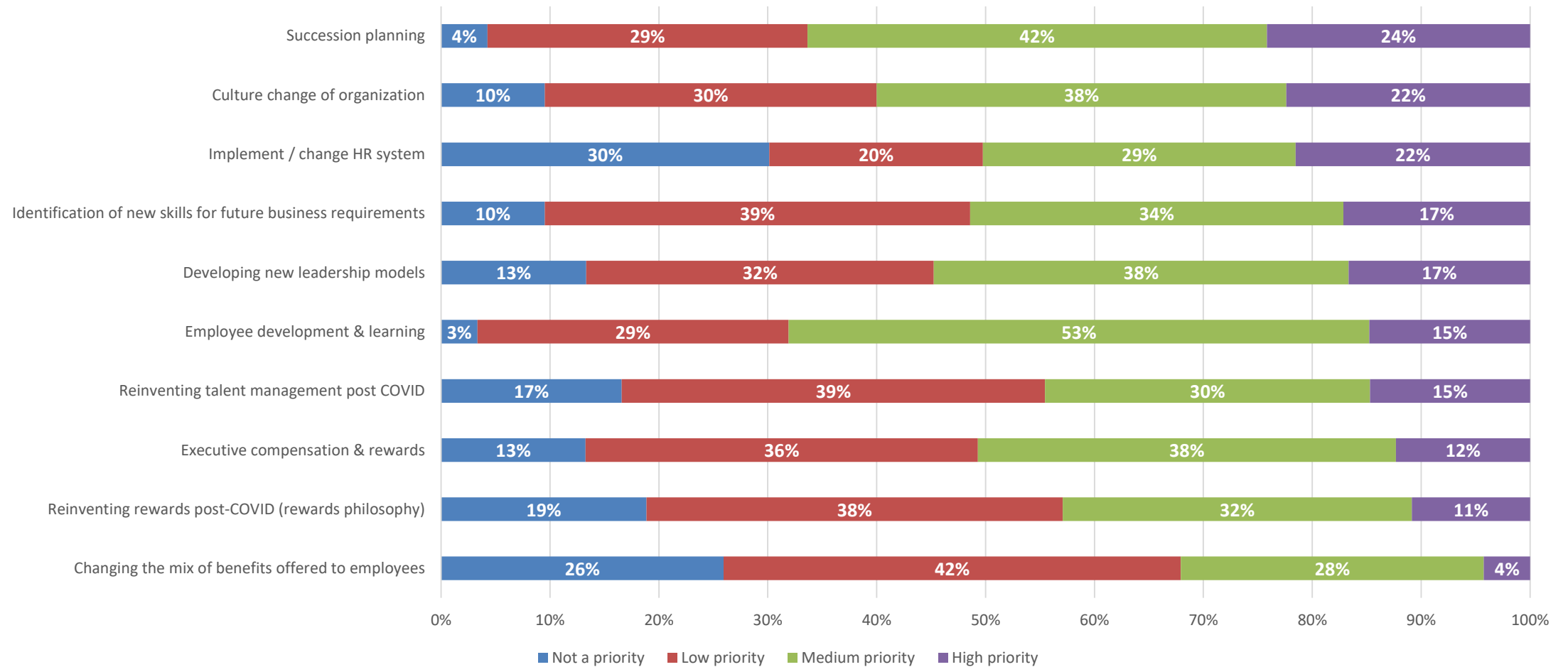
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Please share your HR priorities for 2021 (Top 10 by High Priority)



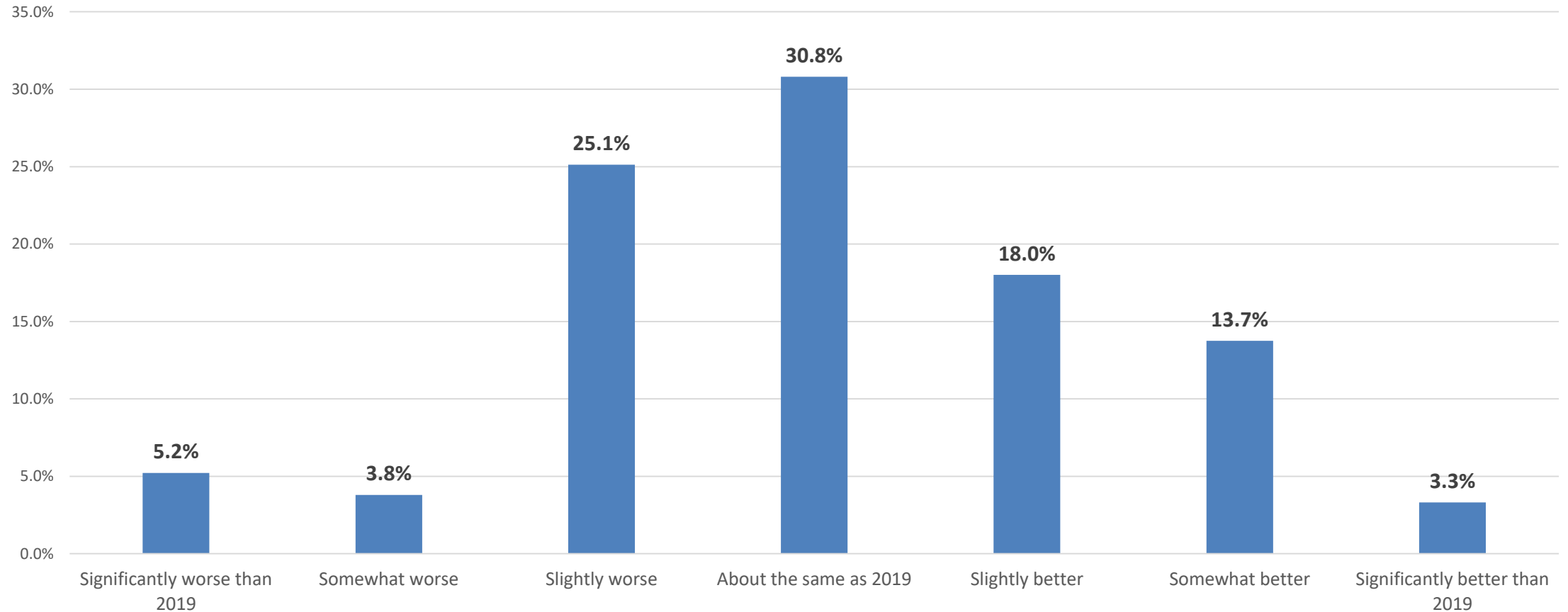
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Please share your HR priorities for 2021 (Ranked 11 – 20 by High Priority)



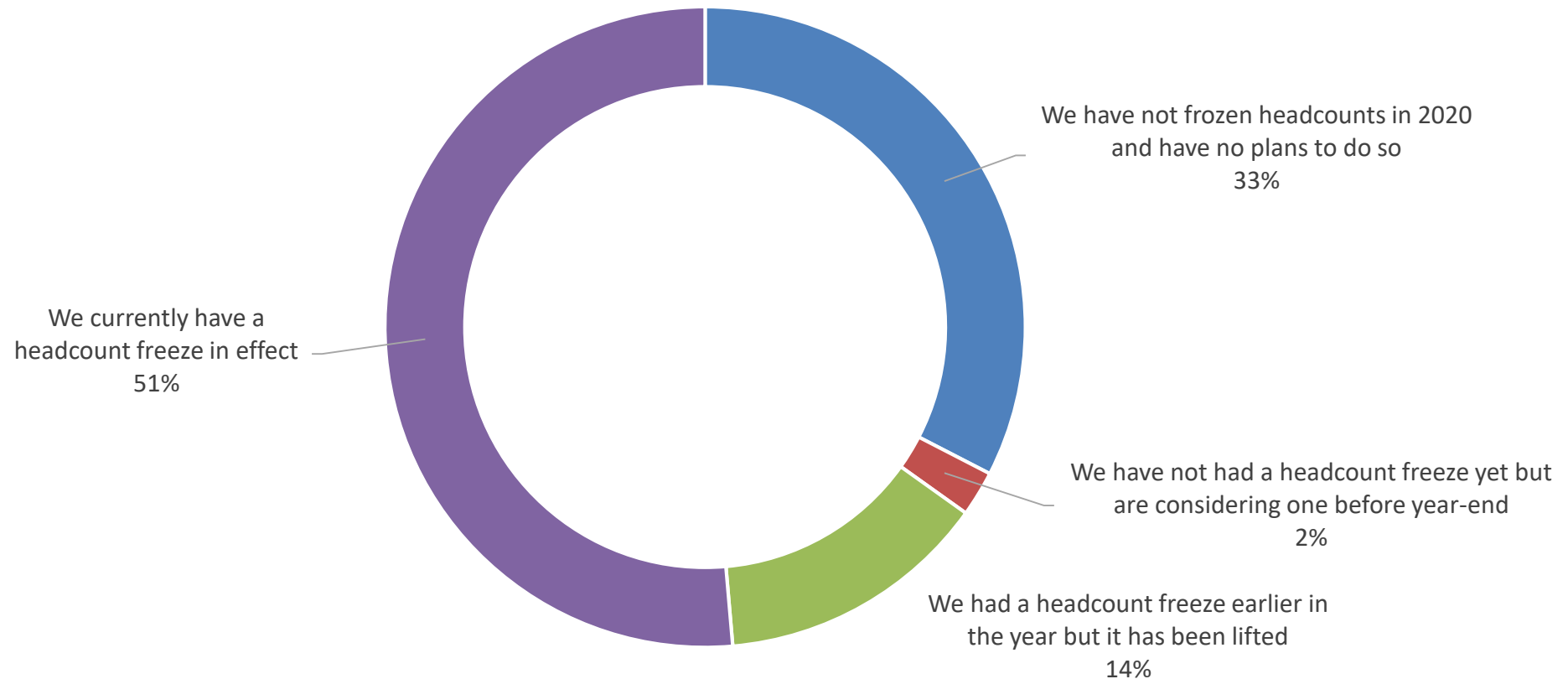
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Level of employee engagement in your organization at the end of 2020 relative to 2019



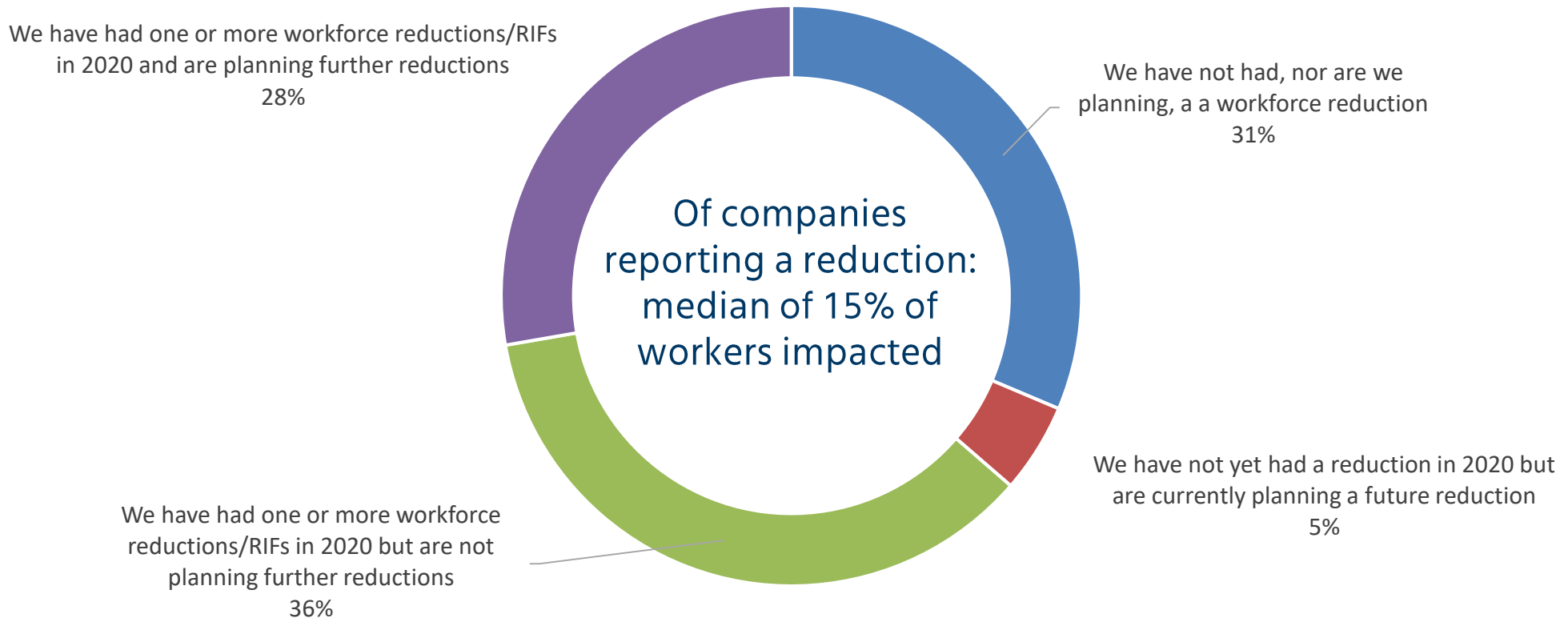
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Has your company implemented (or is planning) a headcount freeze in 2020?



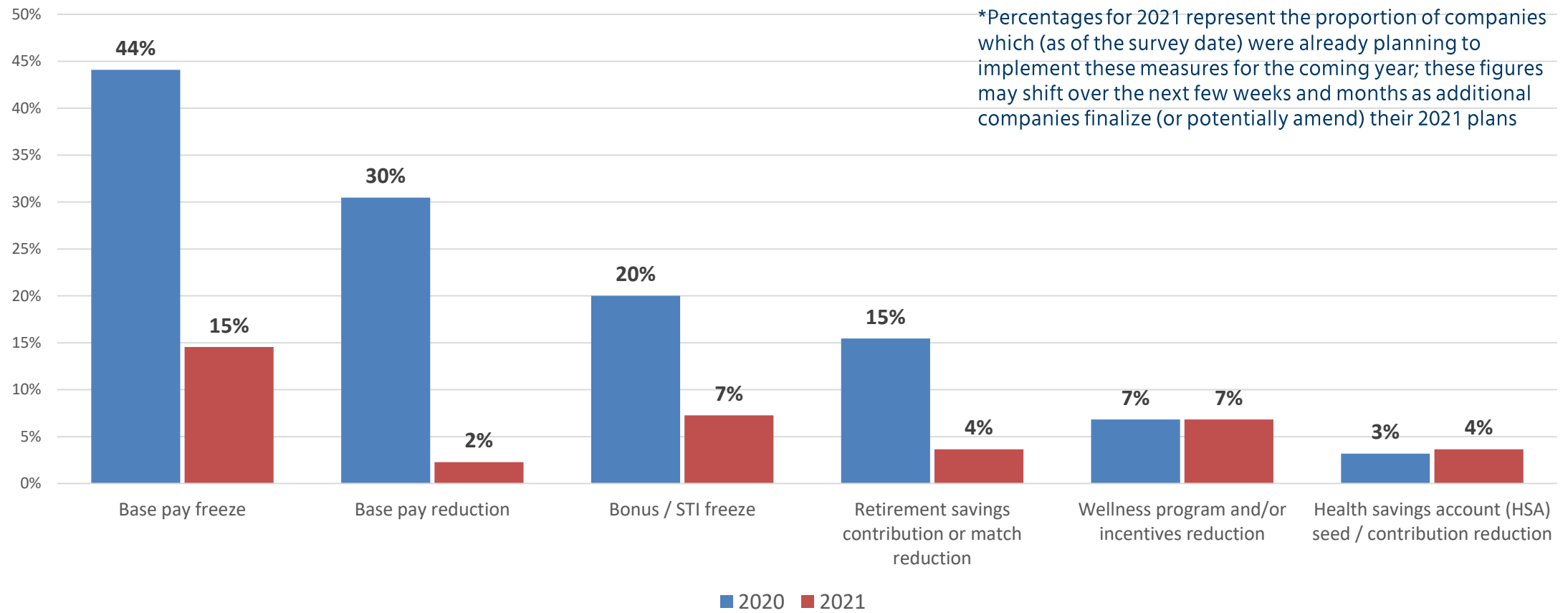
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Has your company implemented (or is planning) one or more workforce reductions in 2020?



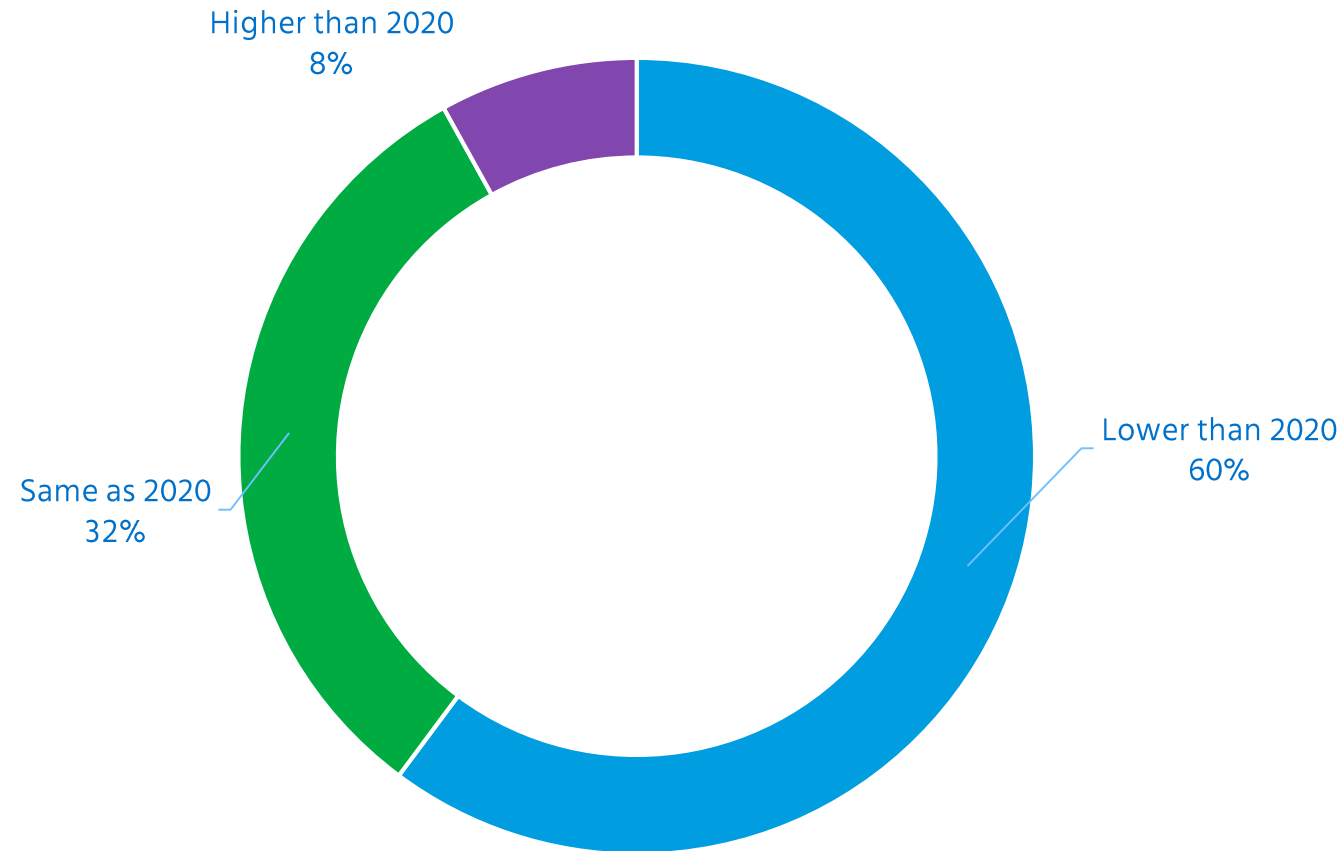
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To what extent have companies implemented the following measures for 2020 or are planning to implement for 2021*?



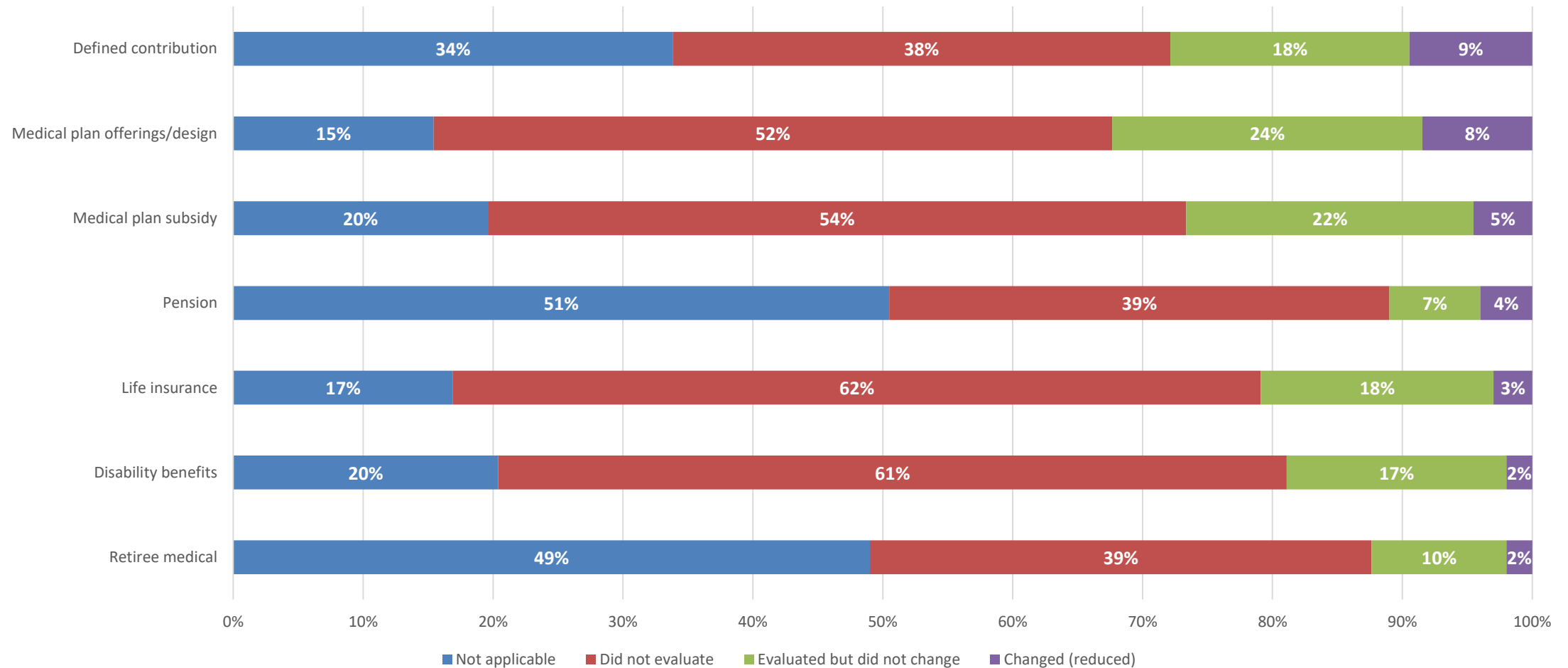
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How do forecasted bonus payouts for 2021 compare to 2020?



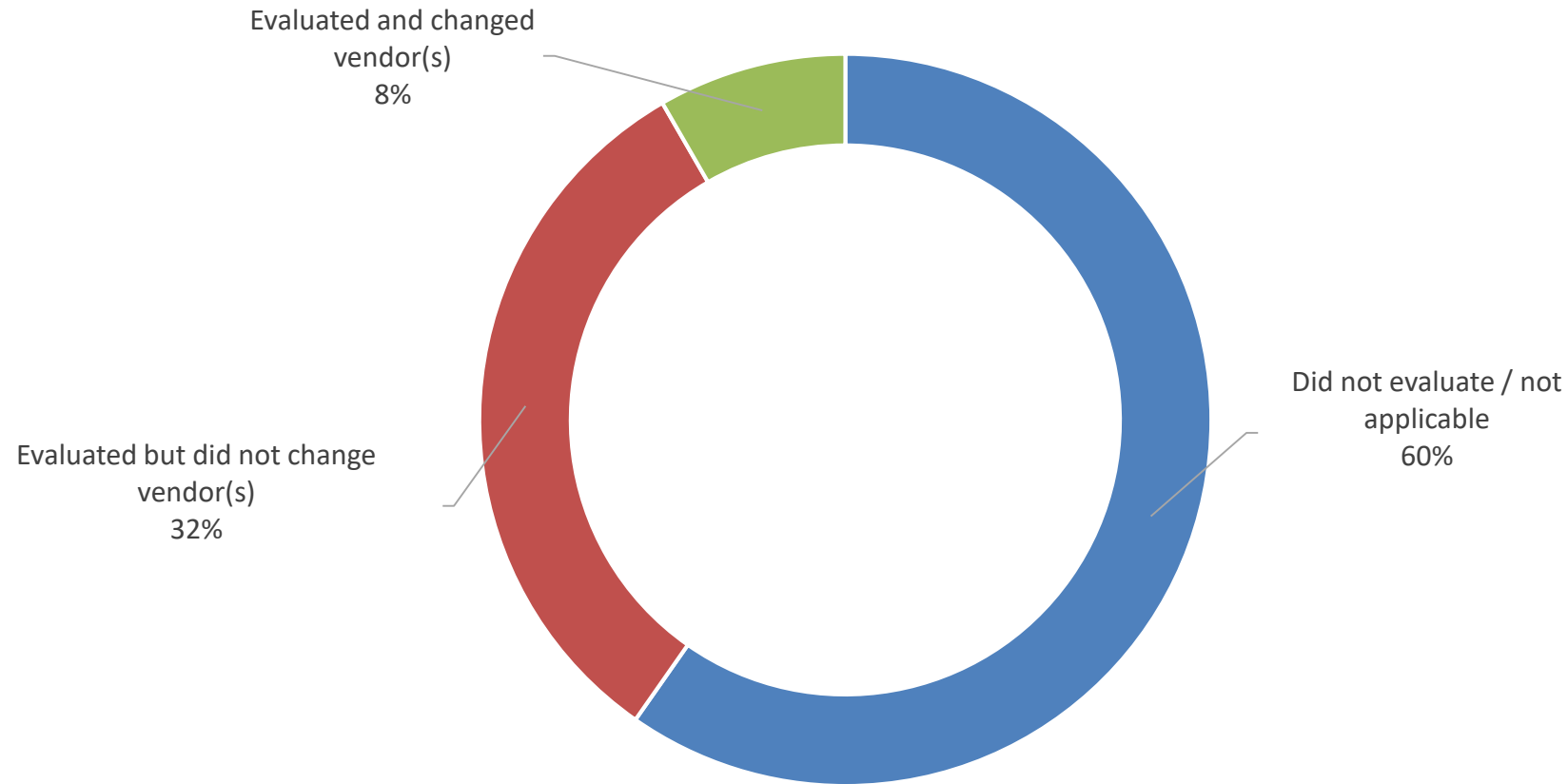
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What benefits did companies consider reducing for 2021?



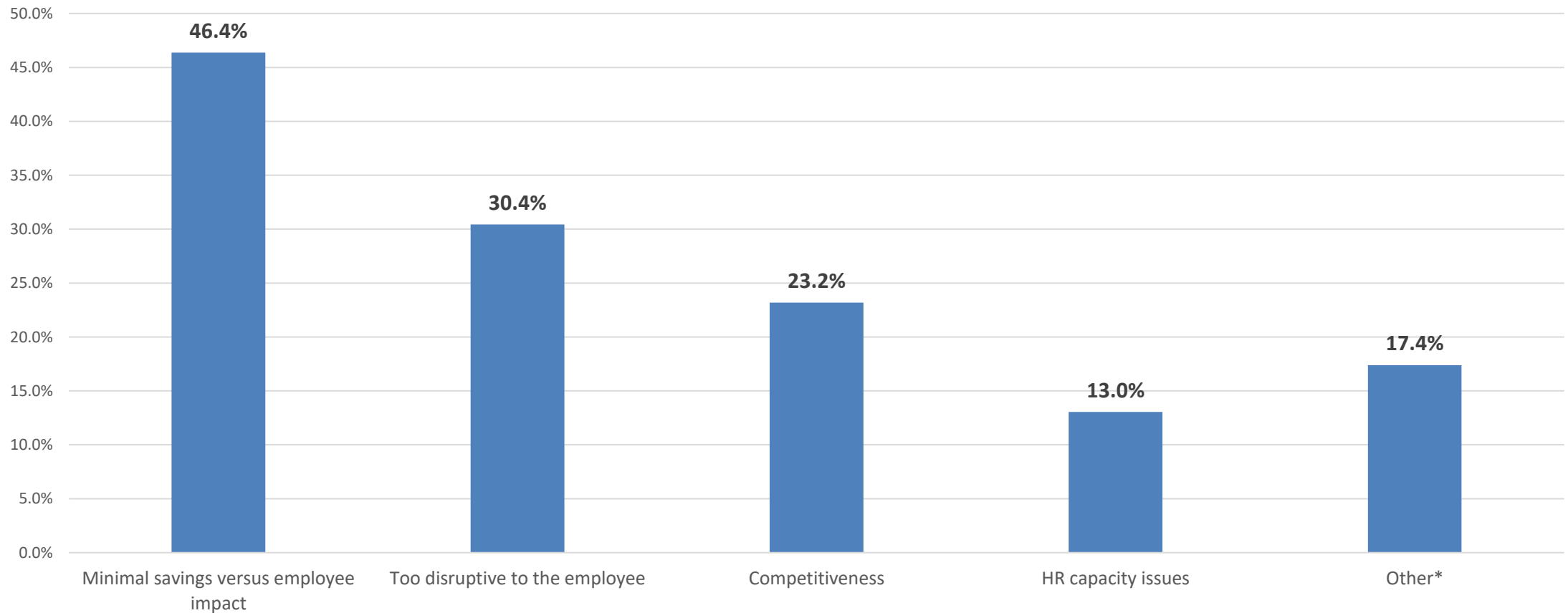
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Did your company evaluate changing health and welfare vendor(s) for 2021?



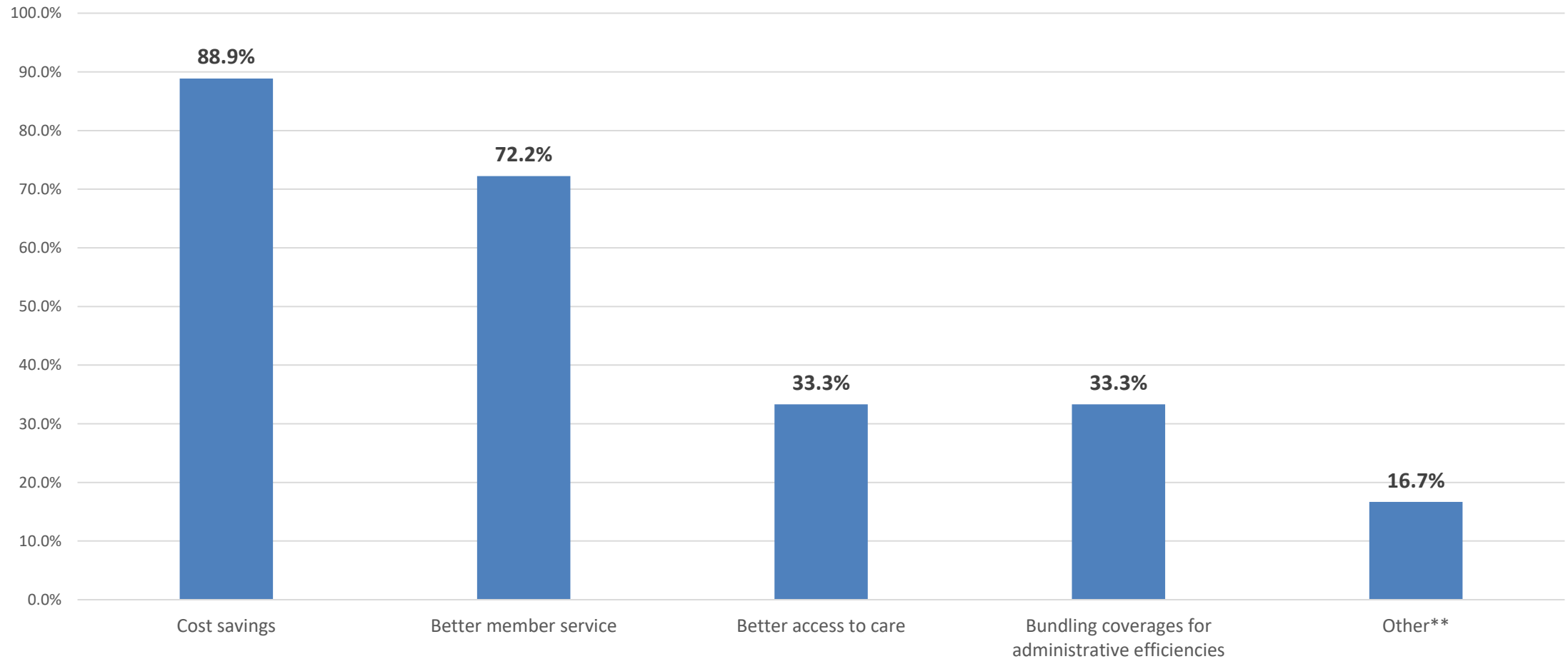
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For what reasons did companies evaluate but ultimately decide not to make changes to health & welfare vendor(s) for 2021?



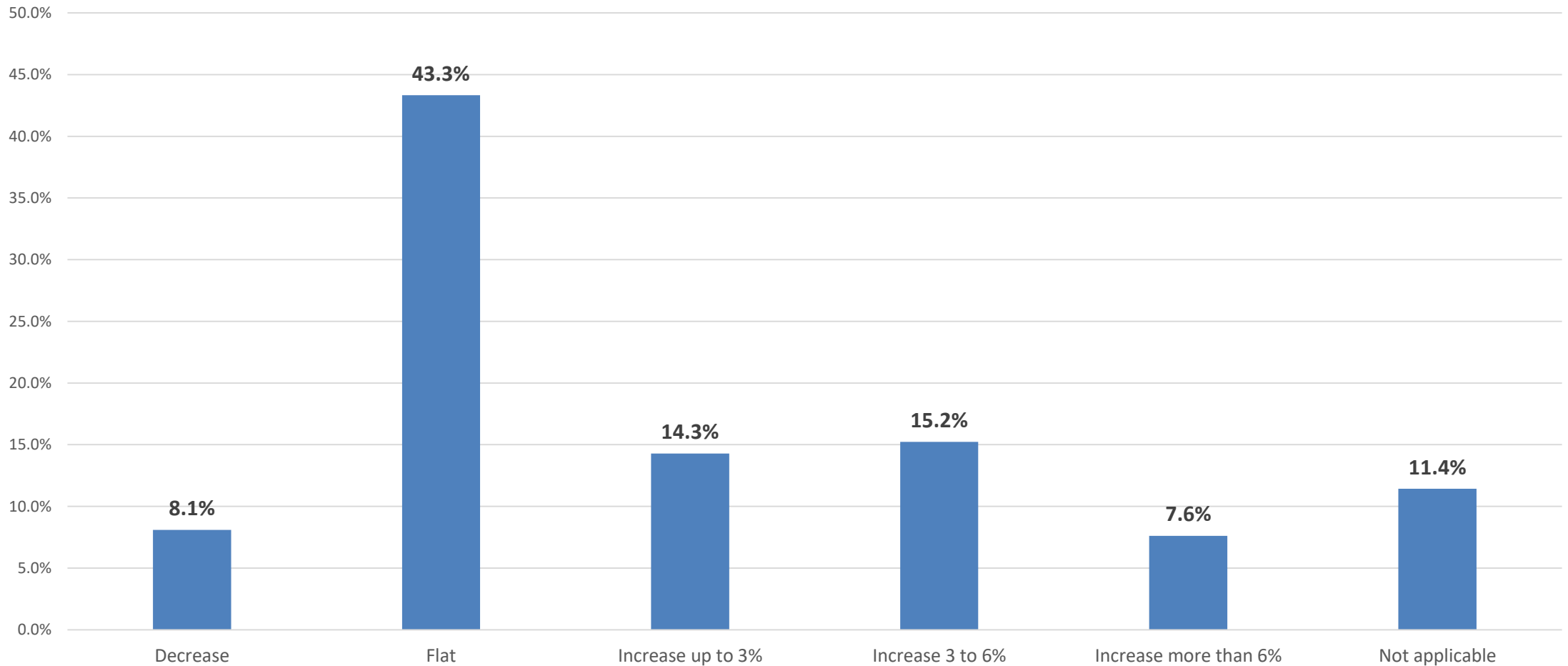
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For what reasons did companies change health & welfare vendor(s) for 2021?



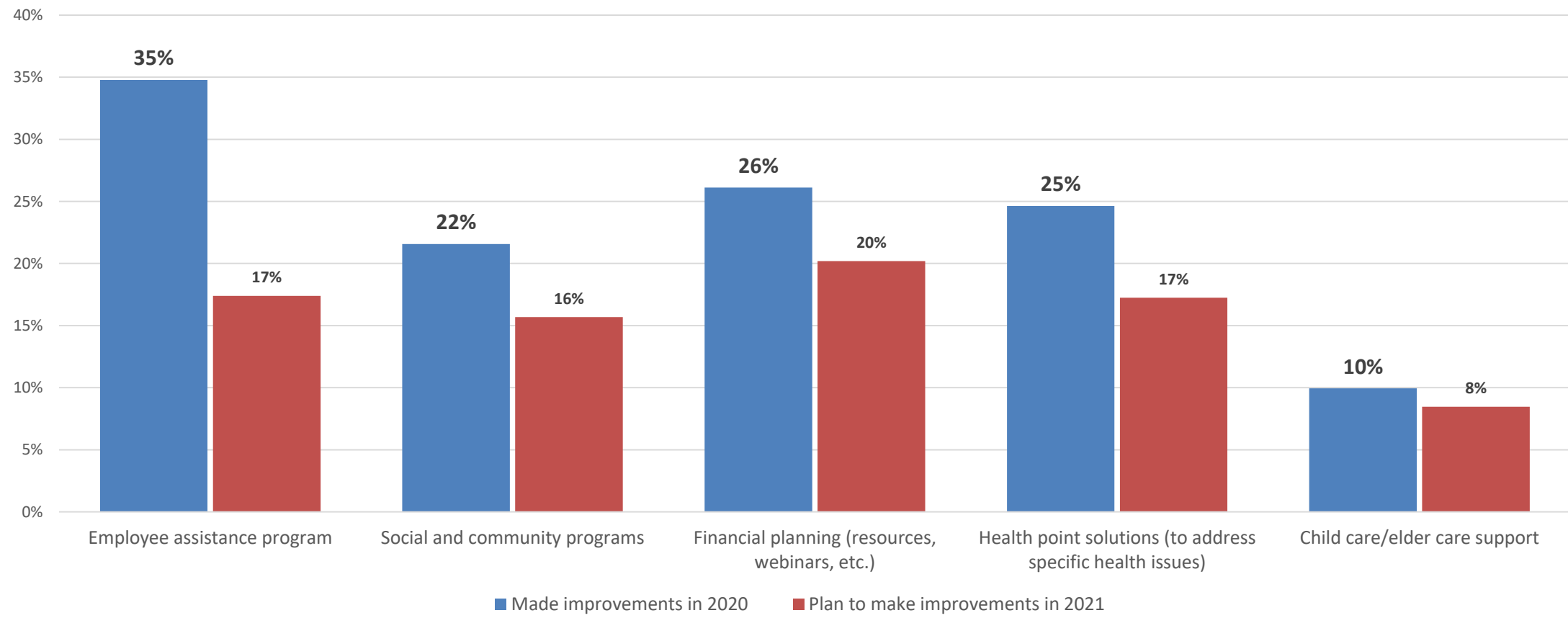
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How much are medical contributions expected to change for 2021?



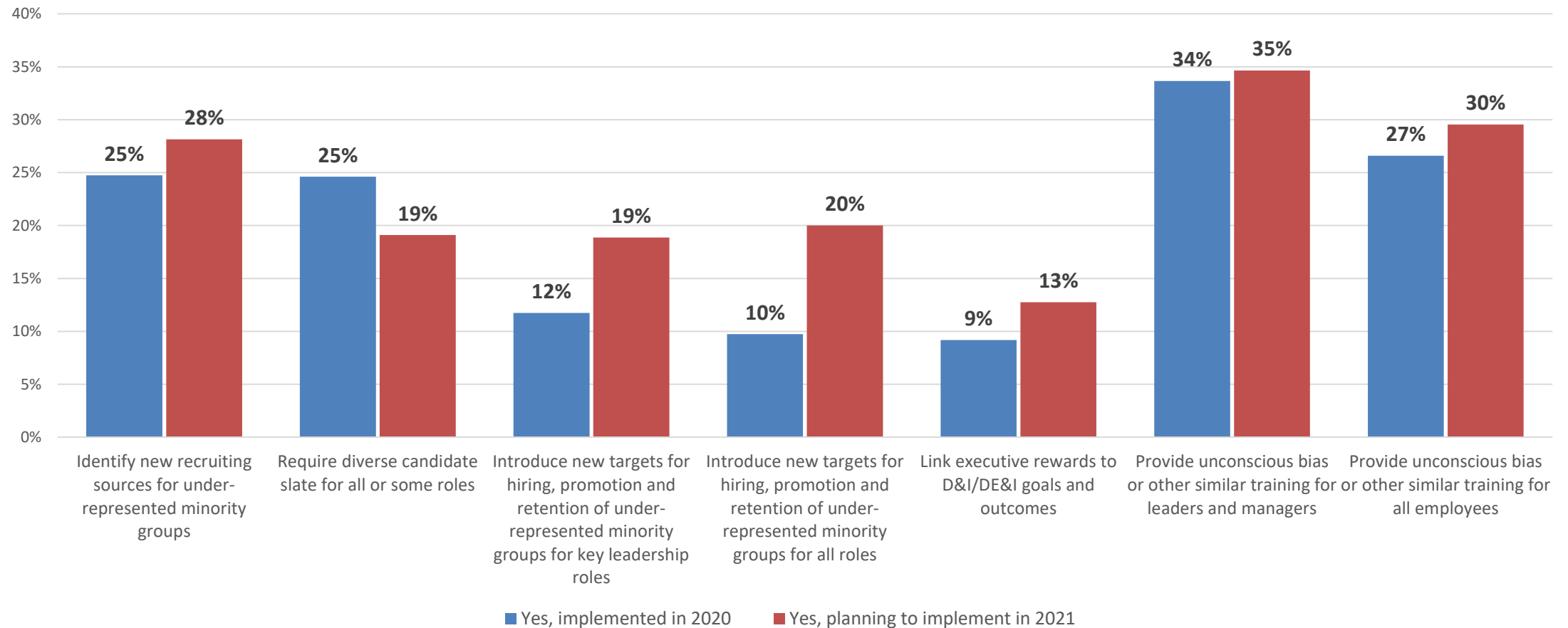
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Which programs have companies made (or plan to make) improvements to in order to address stress, mental health and other behavioral health issues?



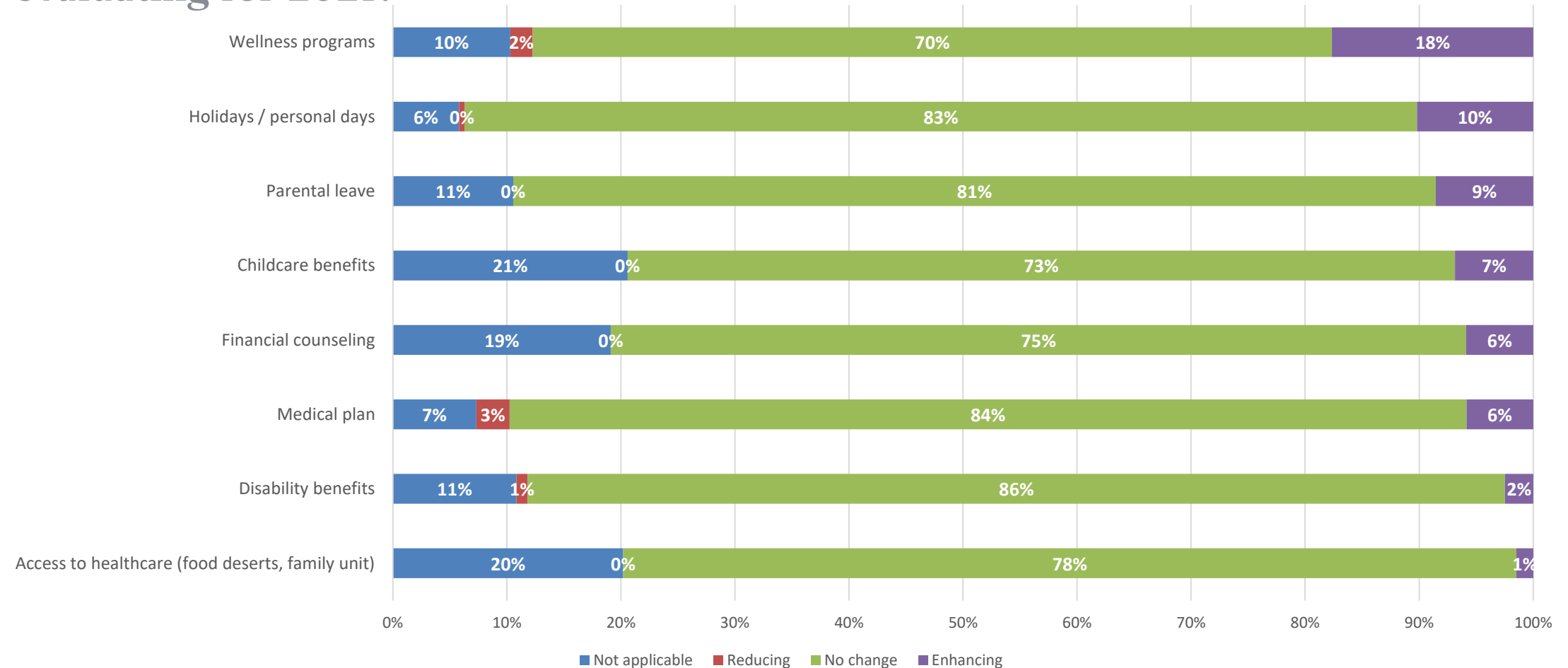
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Which of the following changes have companies implemented (or are planning to implement) to increase the representation and inclusion of minority groups?



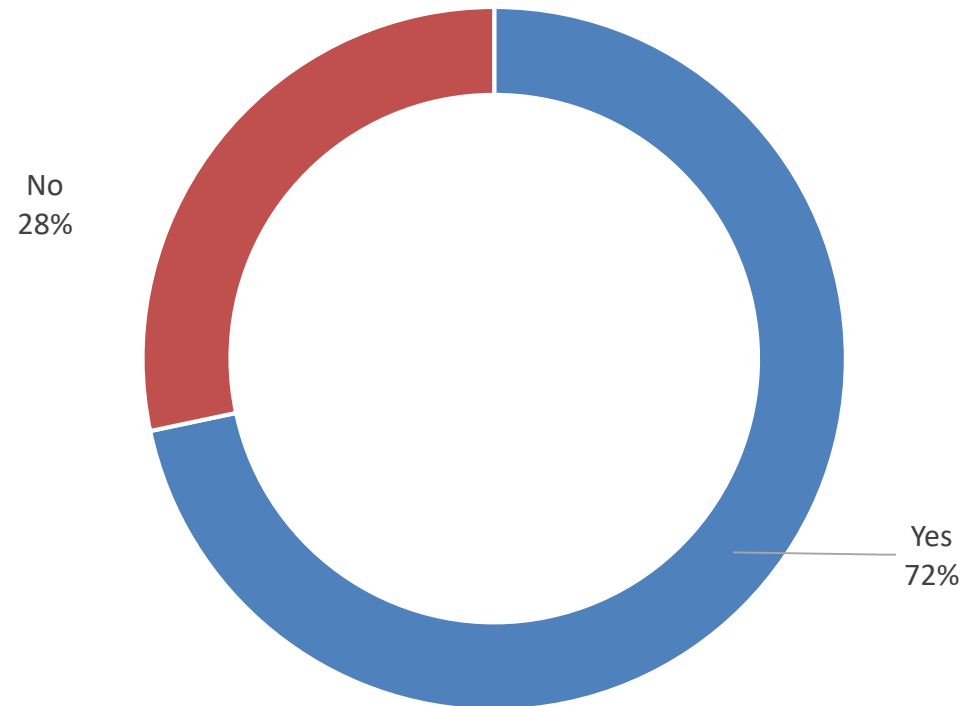
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With a focus on DE&I, which changes to benefit programs are companies evaluating for 2021?



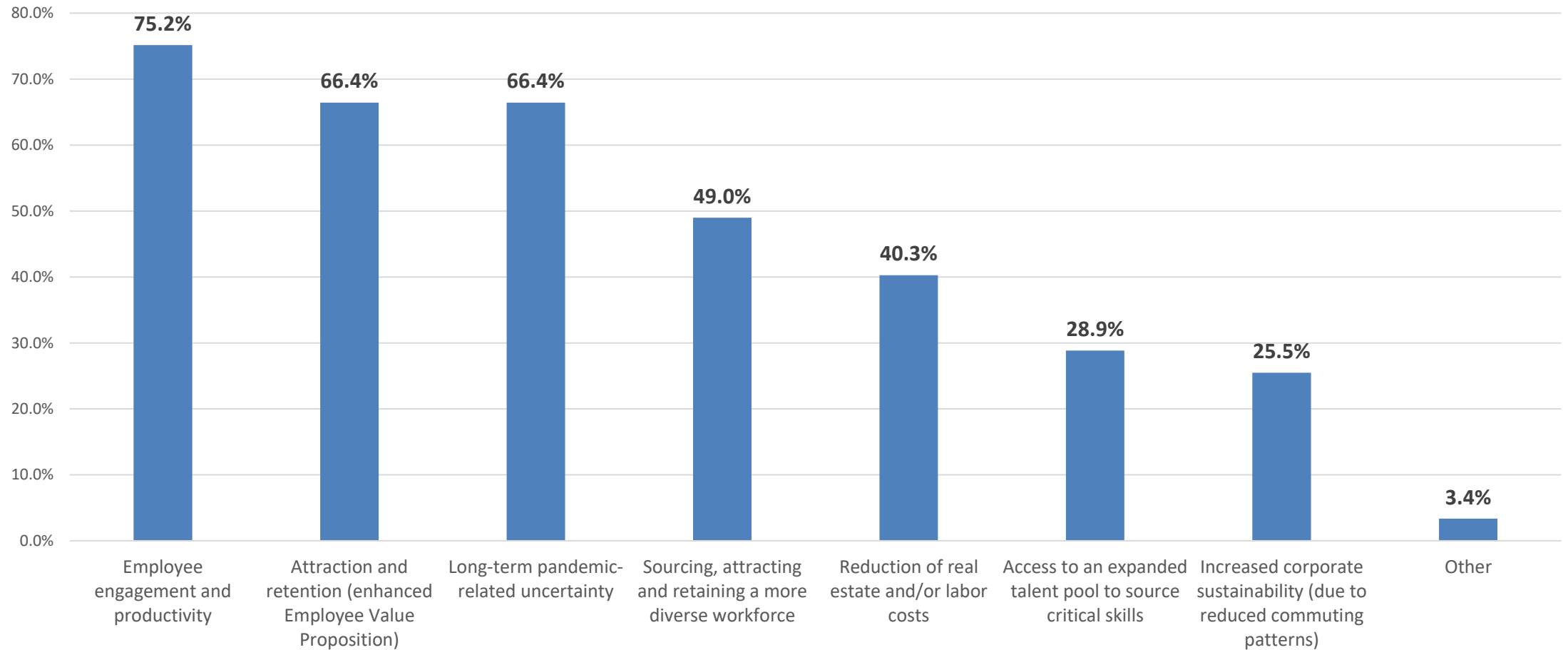
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Is your company considering implementing flexible working at a greater scale than prior to the pandemic?



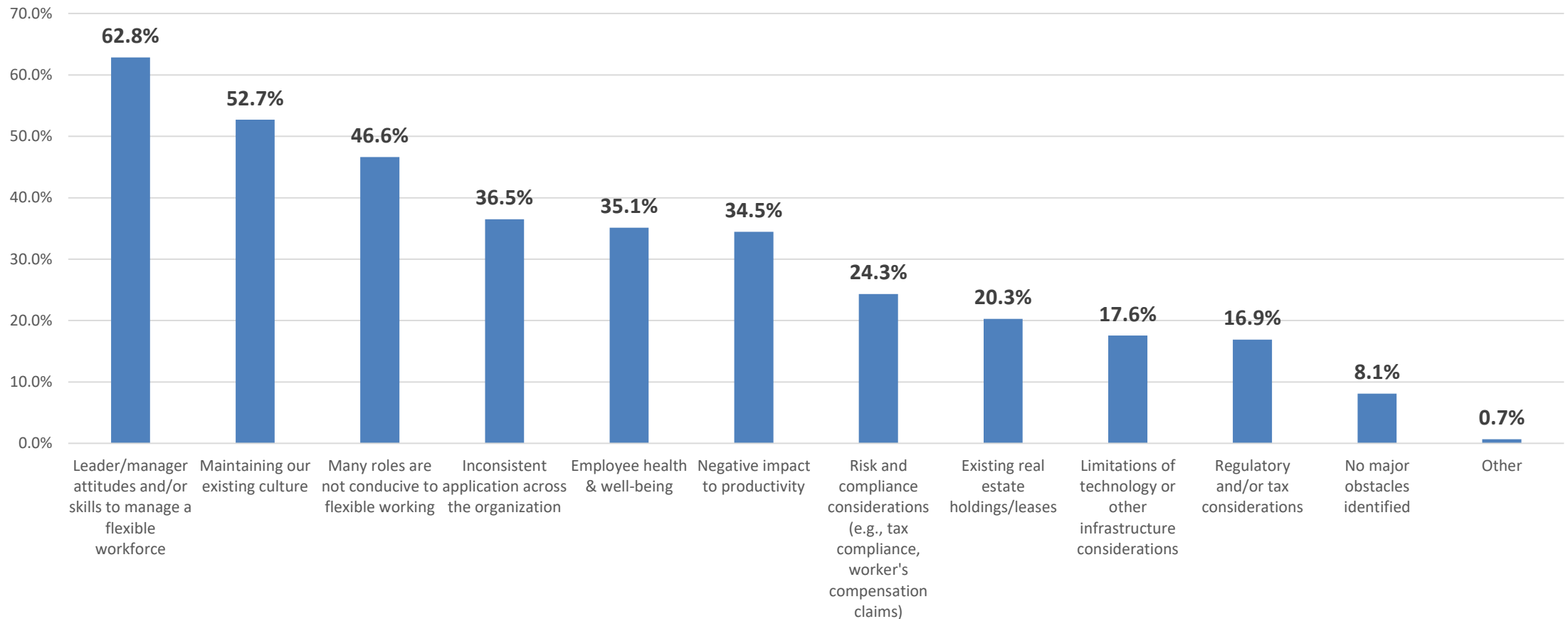
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Why is your company considering flexibility at a greater scale?



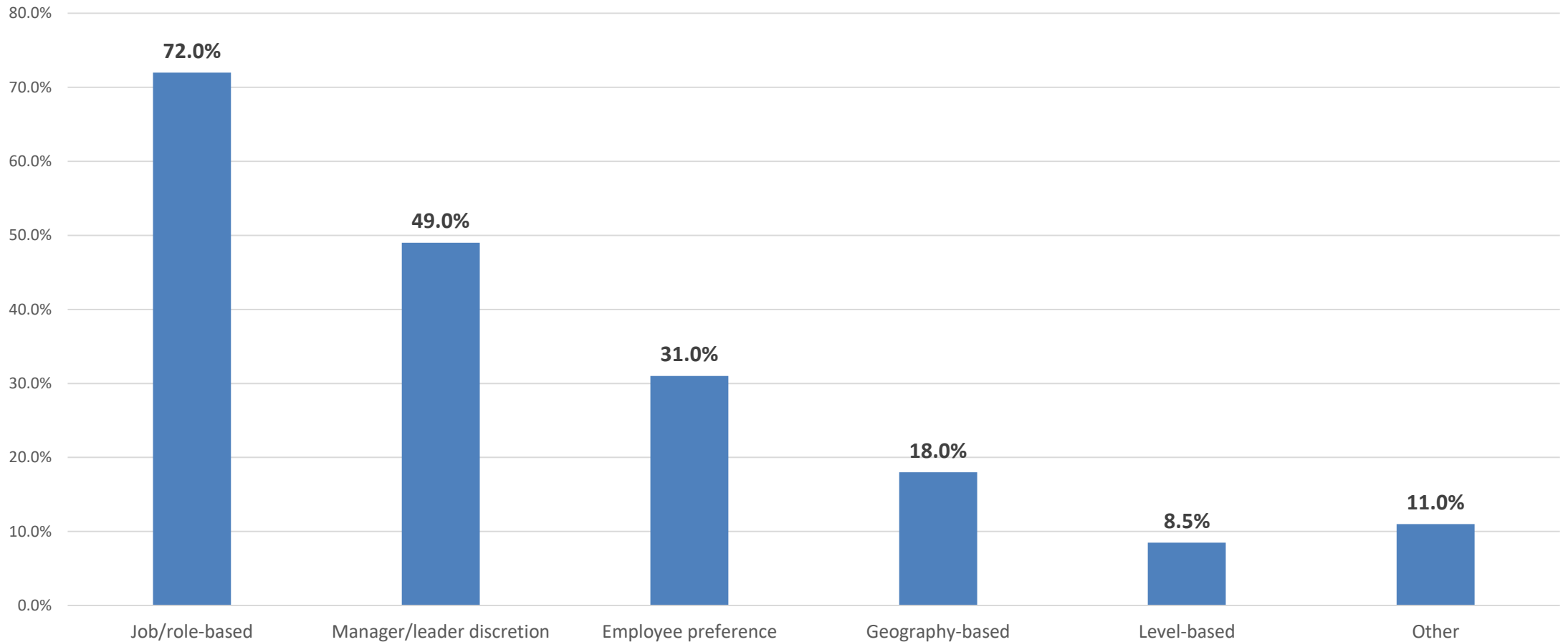
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What are the most significant obstacles or concerns as you consider executing flexibility at greater scale?



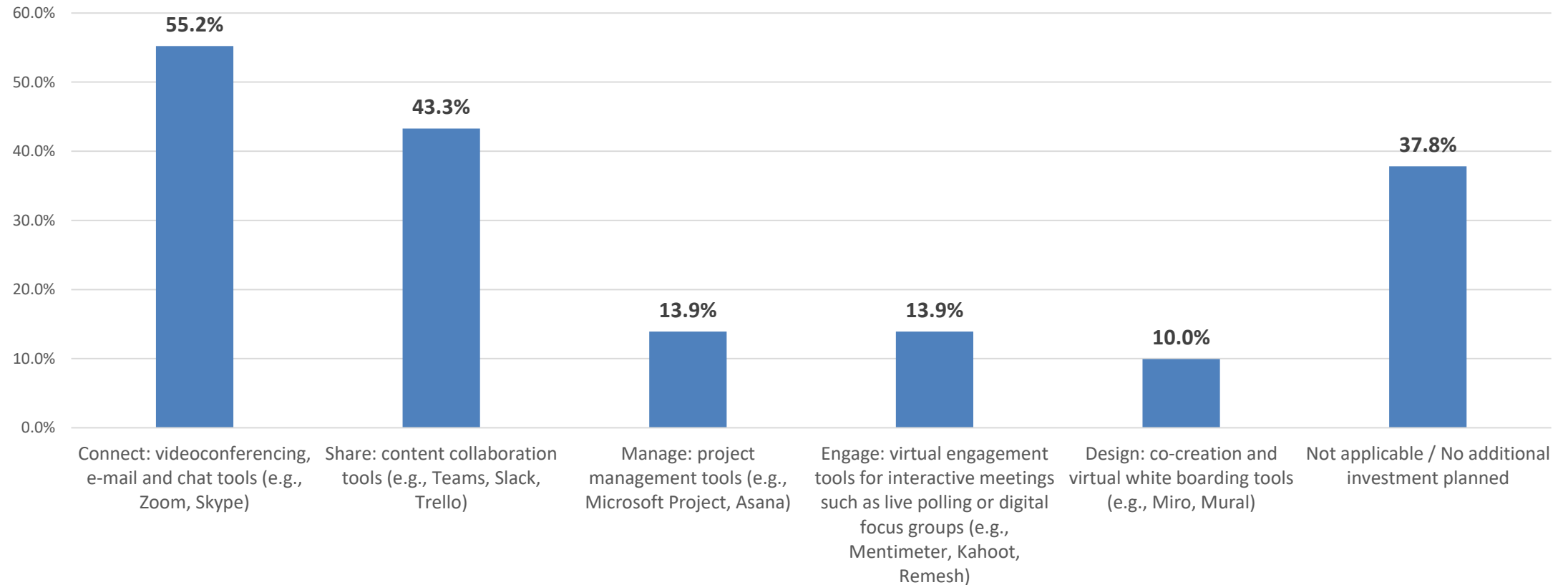
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How is eligibility for flexible working determined?



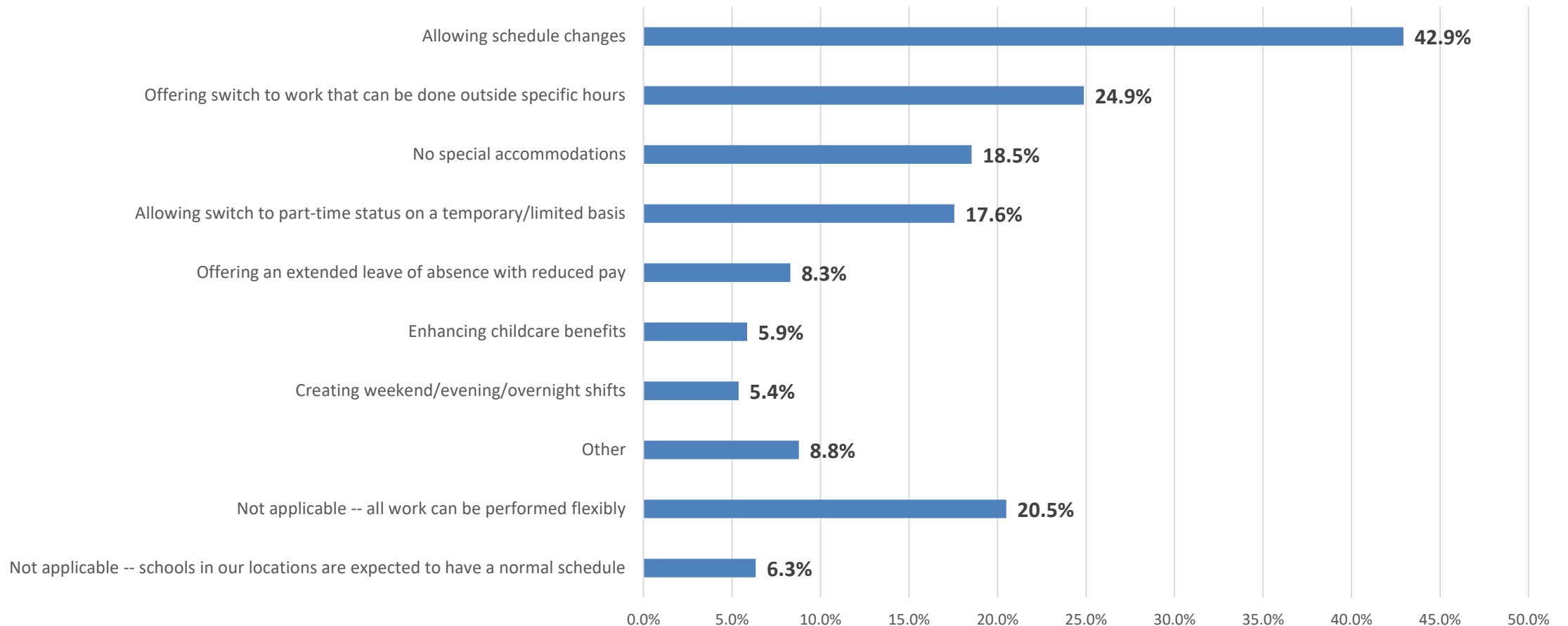
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What categories of tools and technologies will investments be made to enhance flexible working?



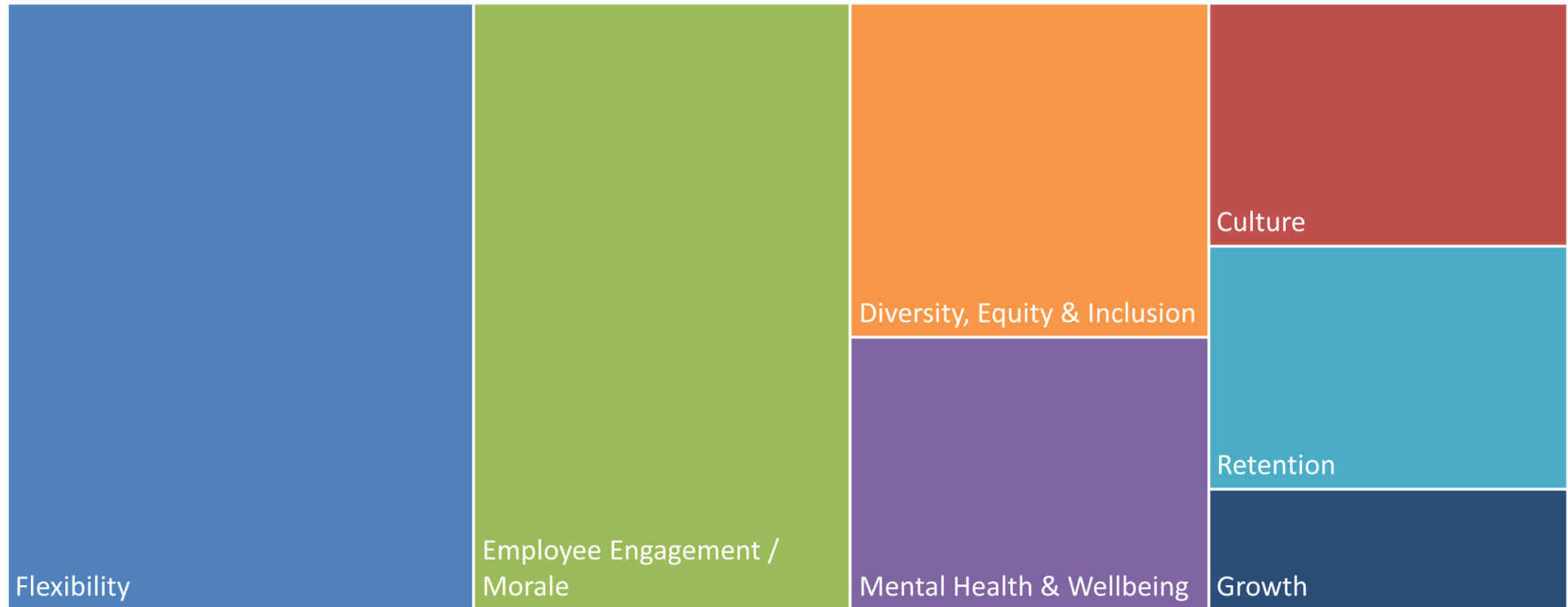
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In many locations, schools may not operate on a normal schedule in the coming months, creating childcare issues for many parents. For jobs typically requiring employees to work during specific hours/shifts, what short-term flexibility is your company providing to parents?



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If given the opportunity to speak to your CEO about the people aspects of your business, as you look towards 2021, what would be the top area you would engage them on?



Area of each box above is proportional to the number of comments received per category.

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110+

Energy **surveys** delivering sector-specific data needs

24

Energy **centres of excellence** fulfilling client needs locally, regionally & globally

6,000+

Energy **projects** performed annually across Health, Wealth & Career

600+

Consultants working in energy from our diverse pool of over 21,000 colleagues

75

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Asia Pac Energy Forum ♦ Middle East Energy Forum ♦ European Renewables Network

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Key Mercer Energy Vertical Contacts:

Global Energy Leader:

Milan Taylor

milan.taylor@mercer.com

+44 7920 261135

North American Energy Leader:

Heather Griffin

heather.griffin@mercer.com

+1 281 685 9342

Middle East & Africa Energy Leader:

Rob Thissen

rob.thissen@mercer.com

+971 5699 04796

Global Energy Operations Director:

Dan Blobaum

dan.blobaum@mercer.com

+1 913 209 2286

