

MSC 2012 Year-End Workforce Survey

August 20, 2013

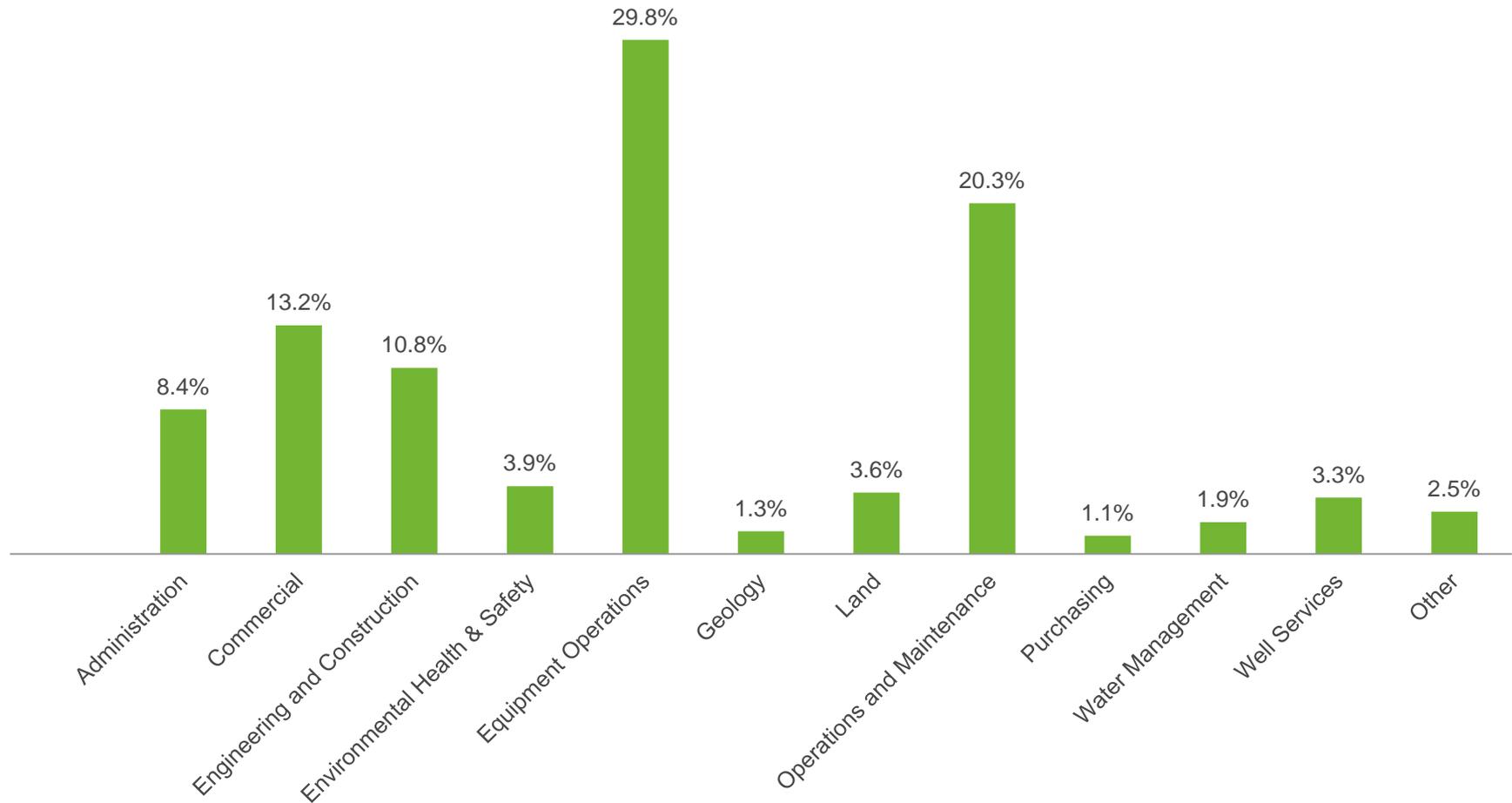
Best response rate since workforce survey initiated:

101 member companies

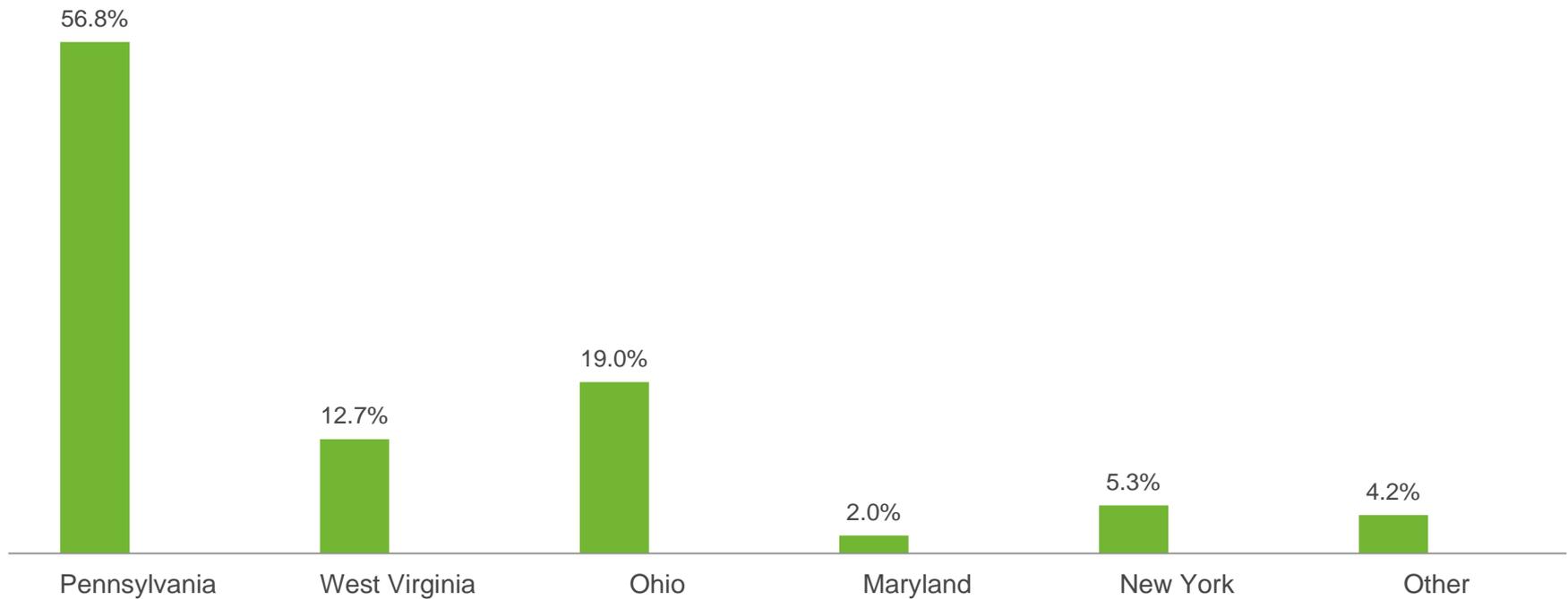
- 83% of executive board member companies
- 67% of board member companies
- 29% of associate member companies

Representing 13,099 employees dedicated to
Marcellus & Utica Shale regions

% Distribution of New Hires in 2012

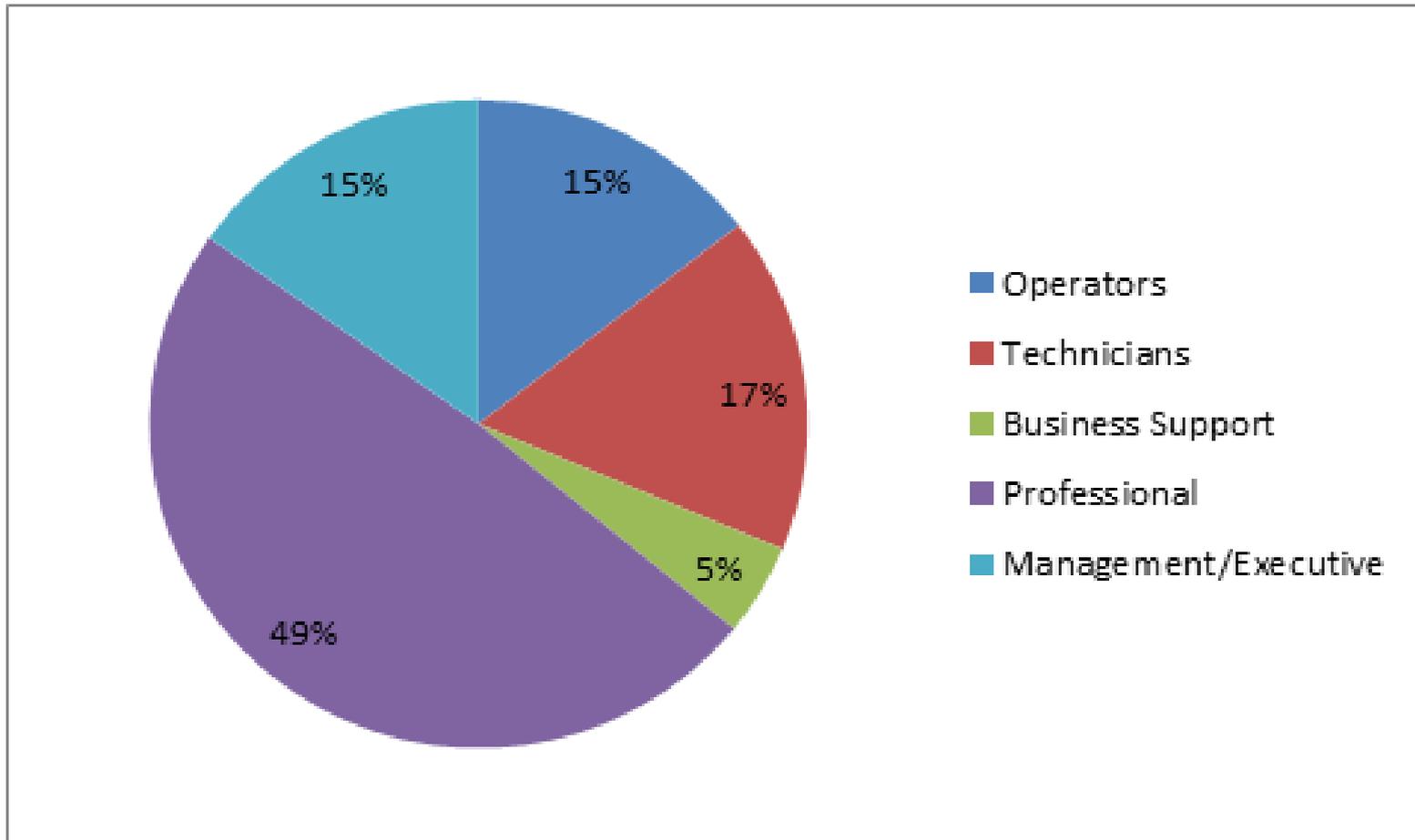


96% of New Hires originated from Marcellus/Utica Shale States in 2012

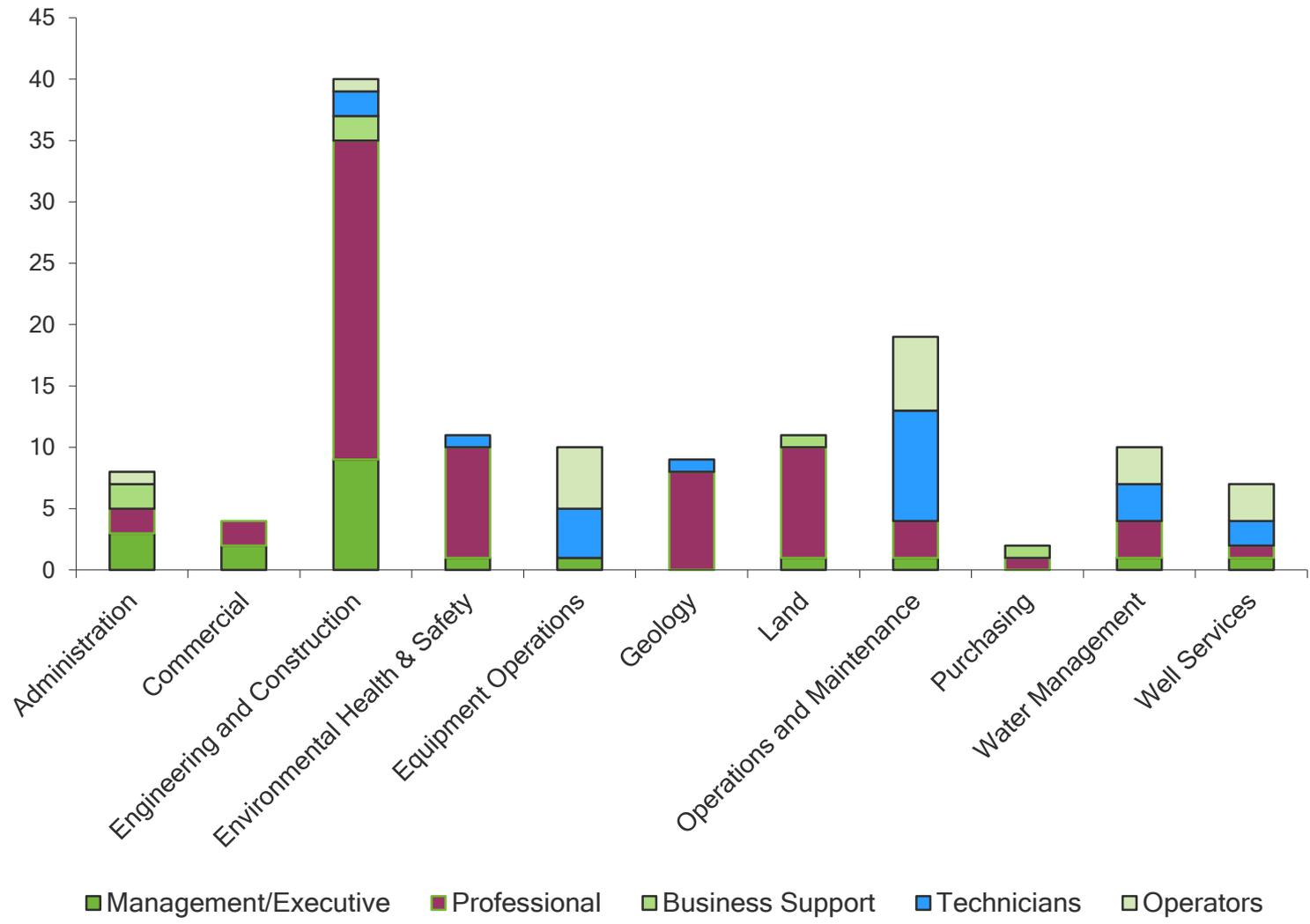


Of the most difficult positions to fill in 2012

- 49% were professional
- 15% were management

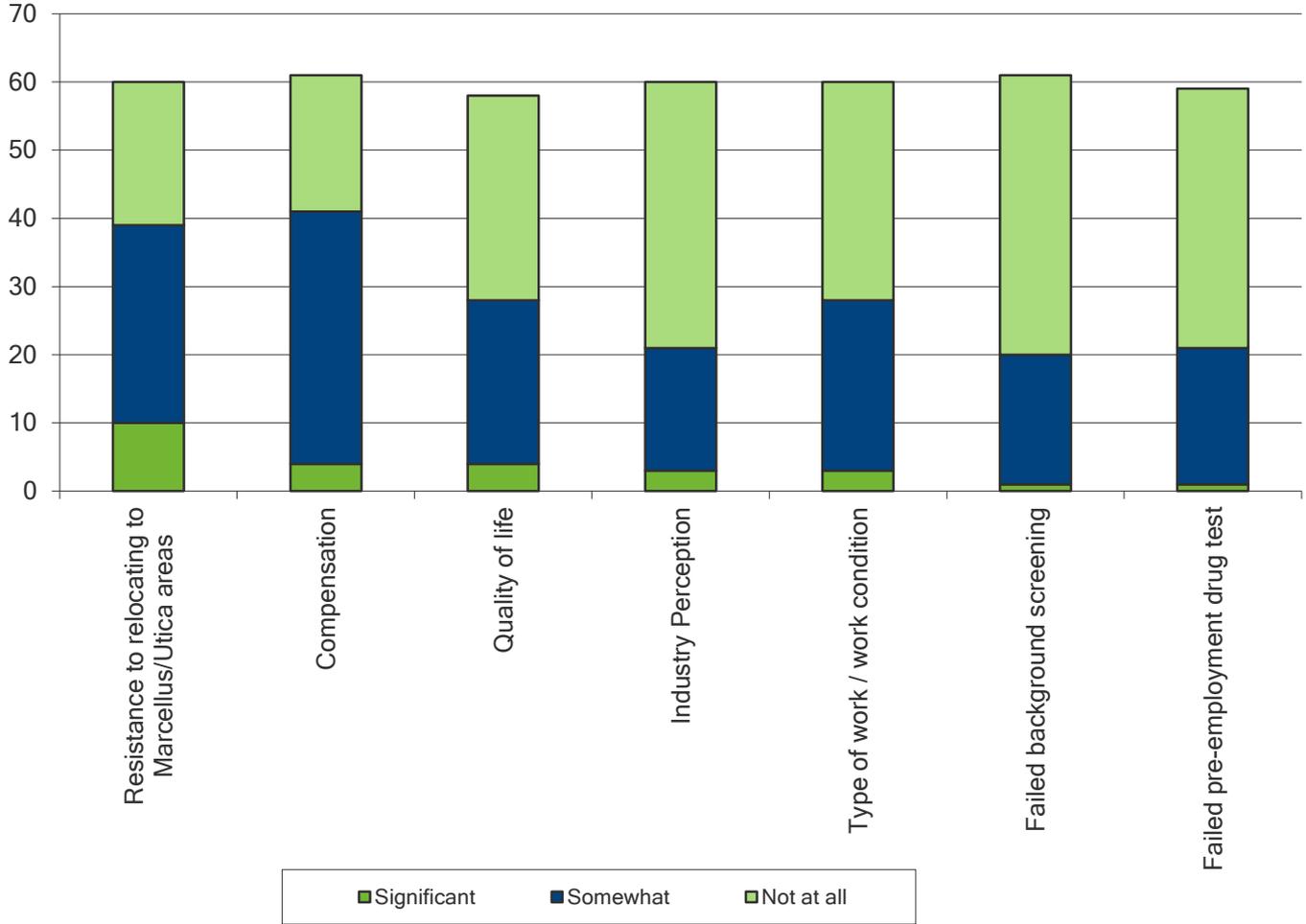


Positions most difficult to fill in 2012

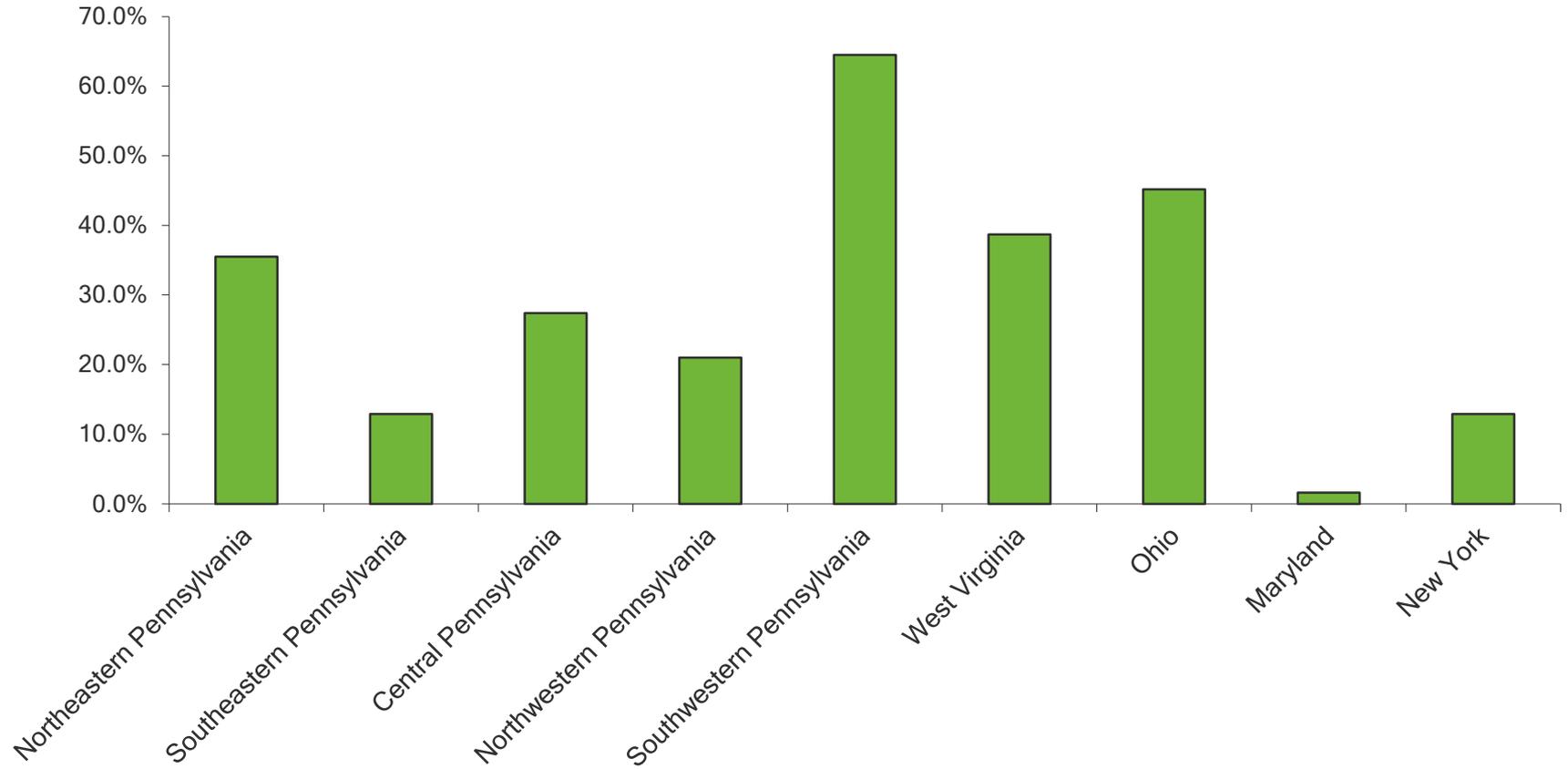


- Qualified Talent (knowledge and experience)
- Competition for Qualified Talent
- Willingness to relocate

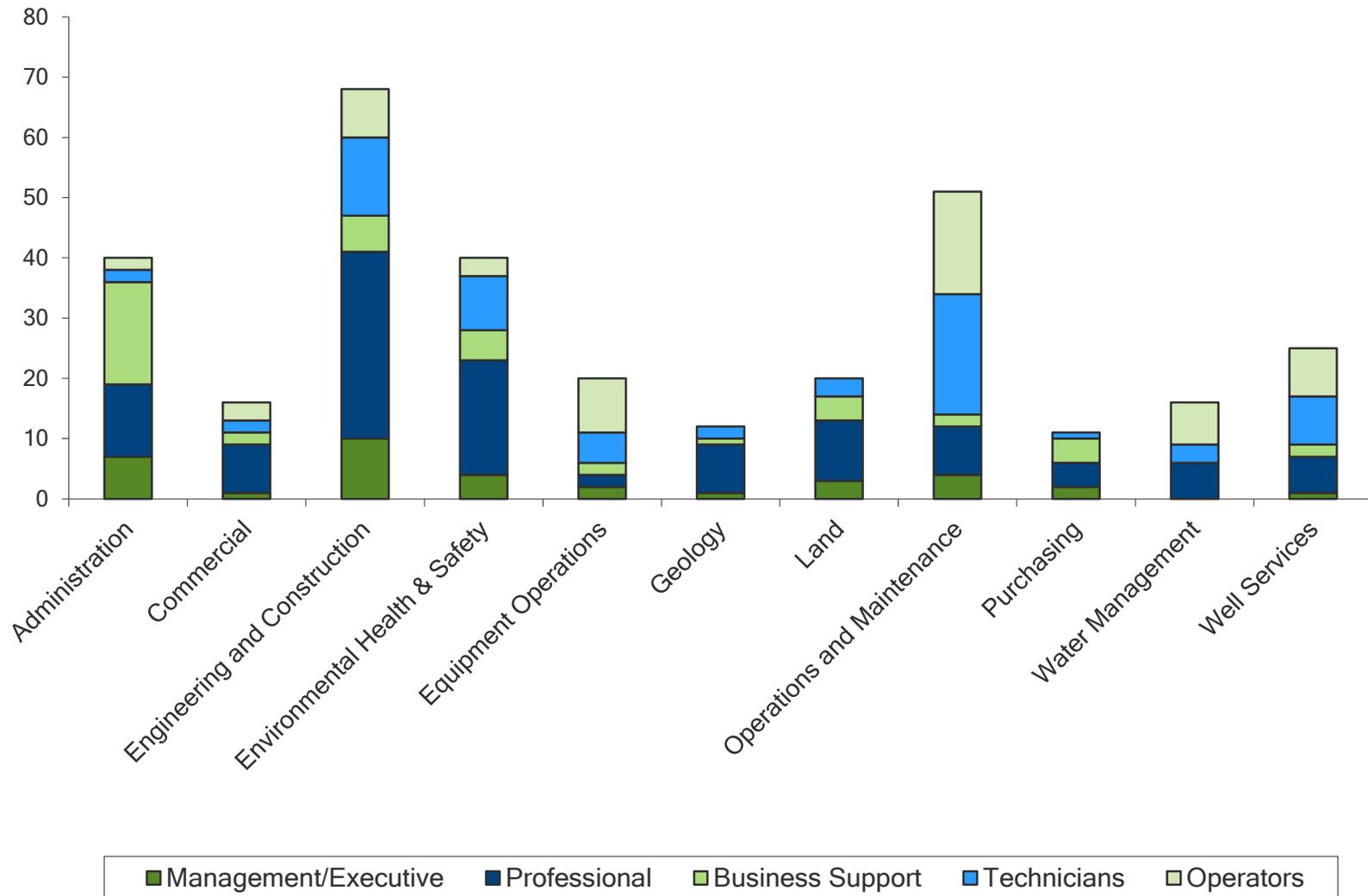
Recruitment Challenges



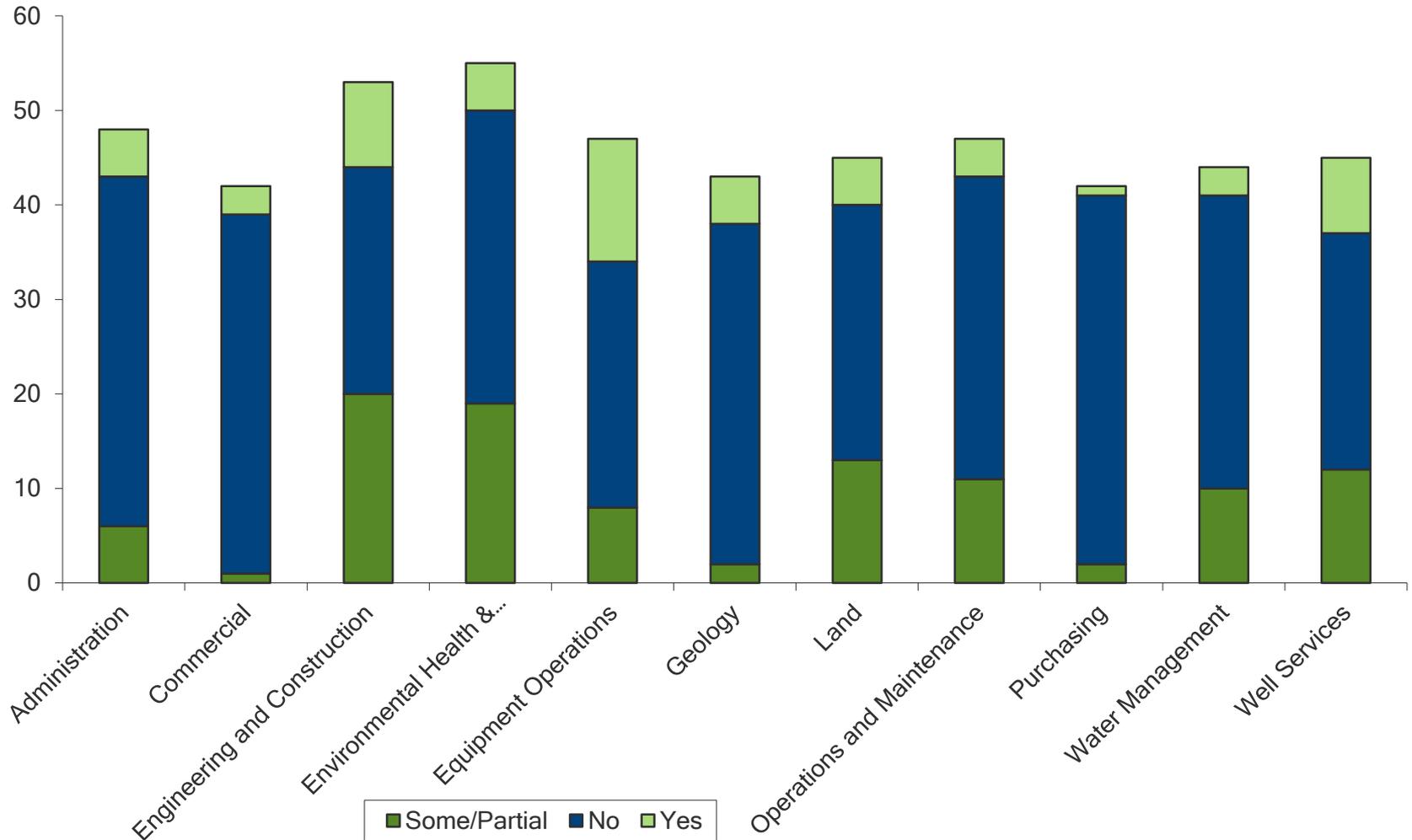
Approximately 4000 new hires expected in 2013 in which locations?



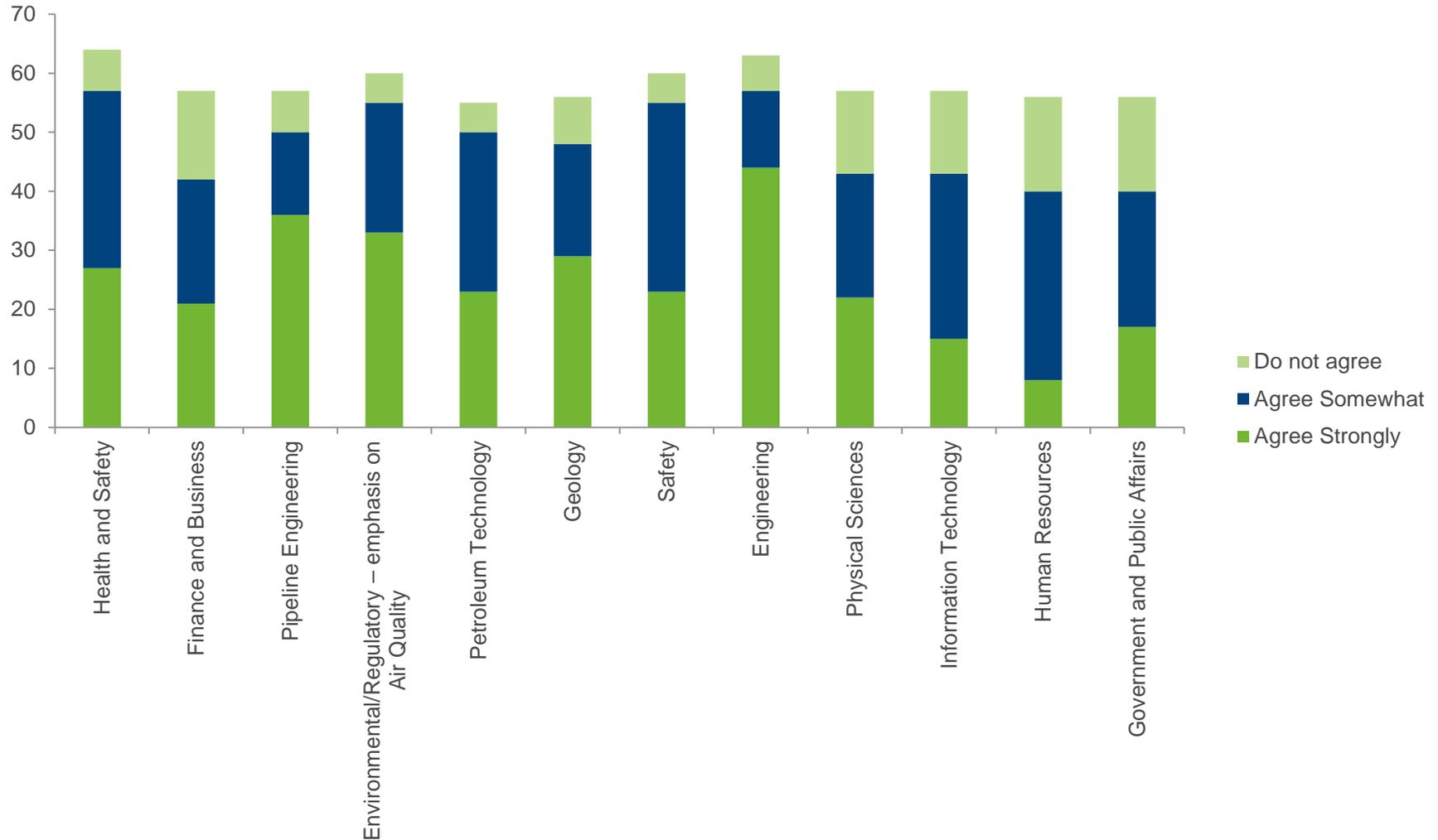
Approximately 4000 new hires expected in 2013 ... in which functions?



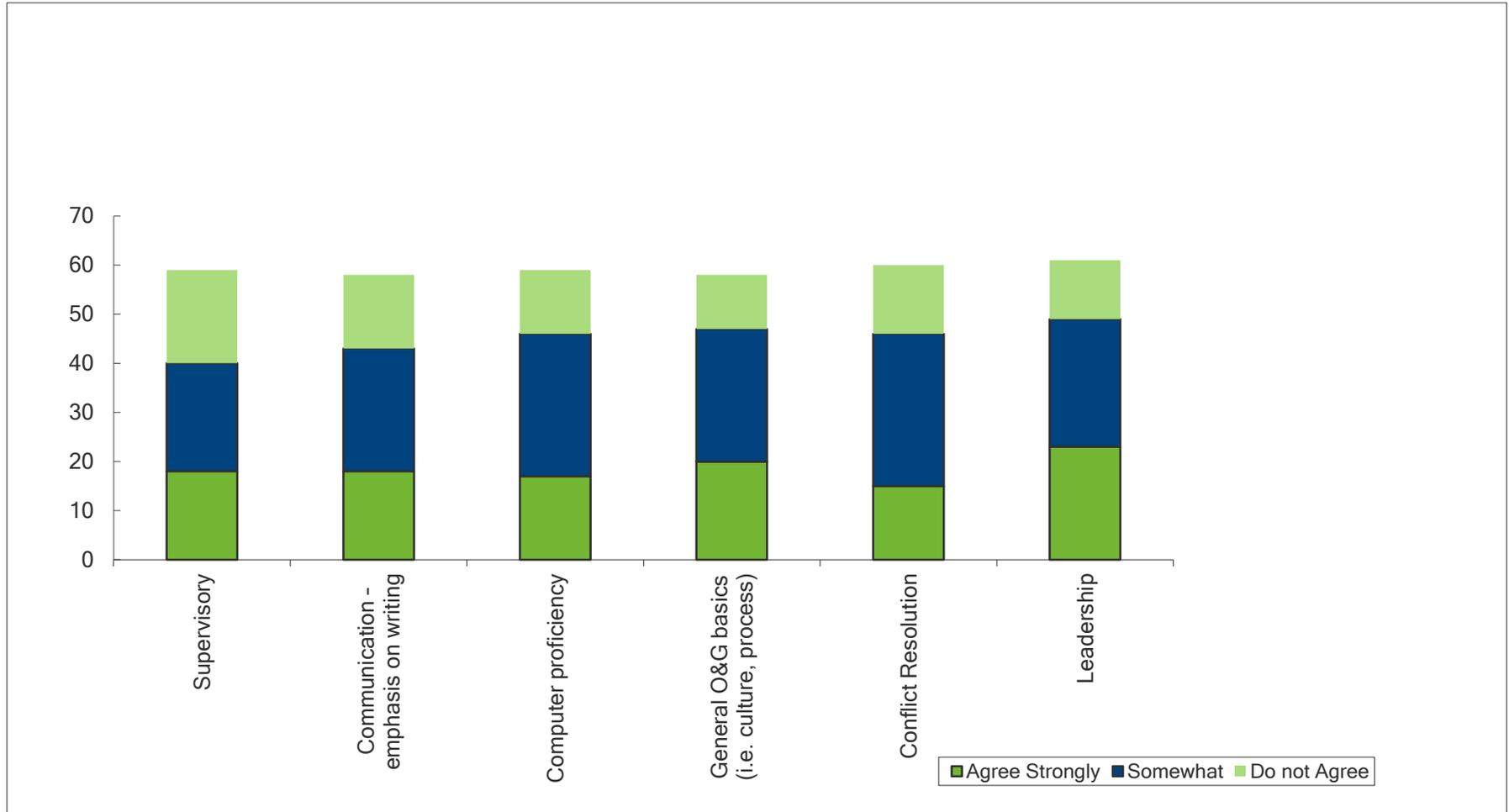
Outsourcing – which functions/services?

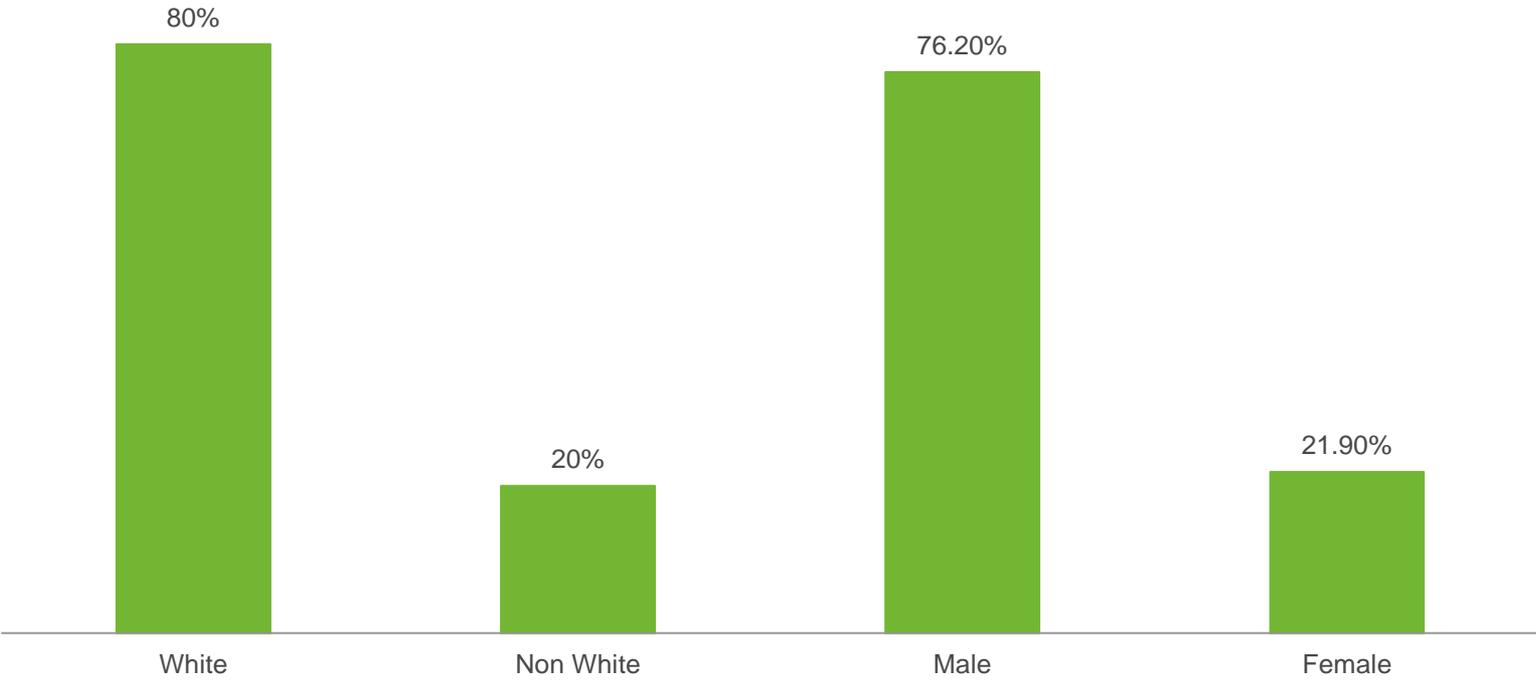


We need 4-year degree programs beyond what is currently available ...



We need certificate programs beyond what is currently available...





Compared to general population of PA :

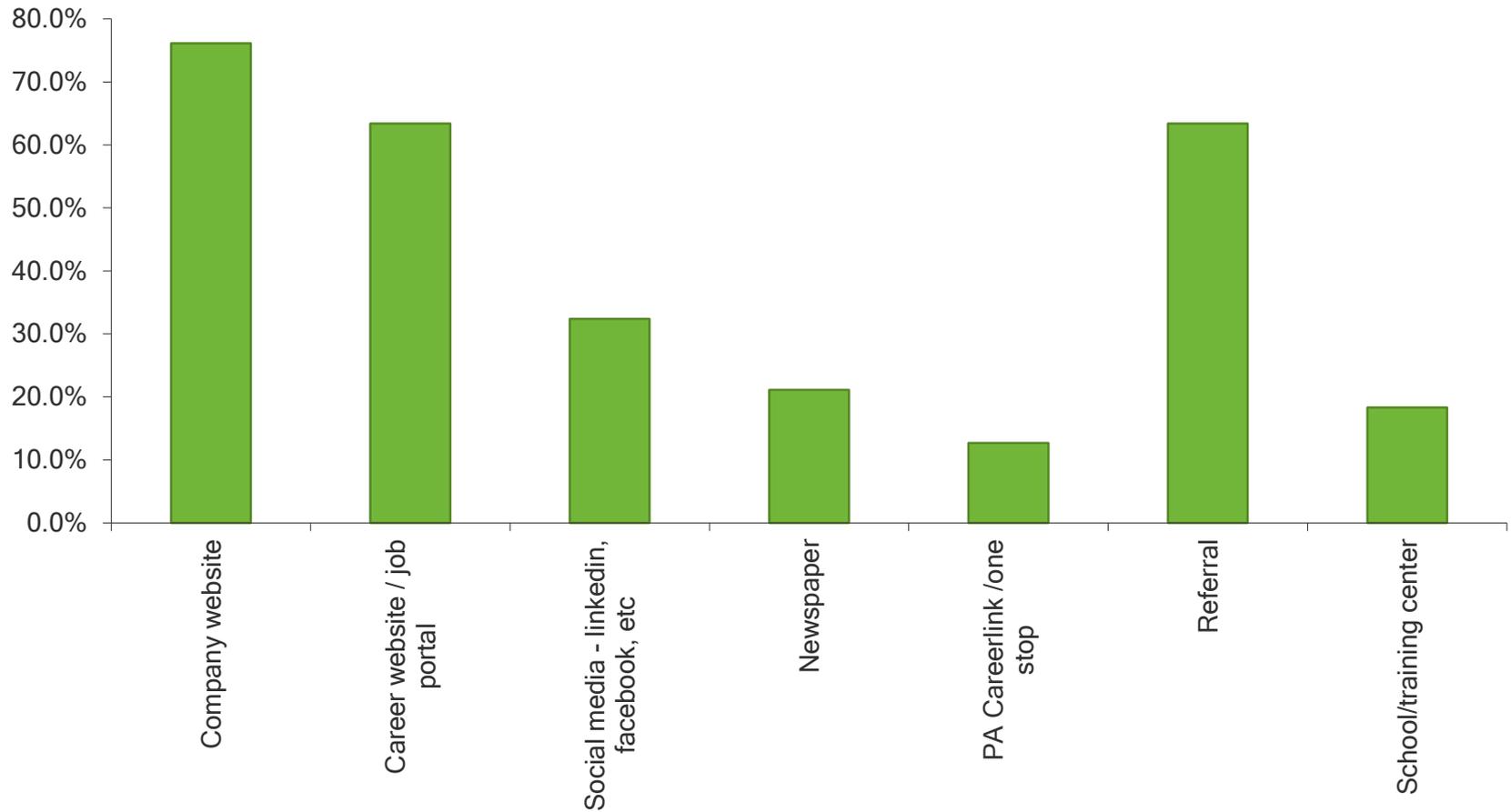
White, non-Hispanic: 83%

Male: 53%

Non White: 17%

Female: 47%

Top Recruiting Methods



Participants

- Access Midstream
- Accutest Laboratories
- Anchor Drilling Fluids USA, Inc.
- Apex Companies, LLC
- Aqua
- ARM Group Inc.
- Atlas Energy LP
- Baker Hughes
- Bergmann Associates, Inc
- Burleson LLP
- Burnett Oil Co., Inc.
- Cabot Oil & Gas Corporation
- Carolyn Henn
- Casella - CARES Water Treatment
- Champion Technologies
- Chesapeake Energy
- Chevron
- Chief Oil & Gas LLC
- Cleveland Brothers Equipment Co.
- CMS Energy
- Columbia Pipeline Group
- CONSOL Energy Inc.
- D.A. Nolt, Inc. of PA
- Deloitte LLP
- Draeger Safety Inc
- DTE Energy
- E-Finity
- Endeavour International
- Energy Corporation of America
- Entech Engineering, Inc.
- Environmental Drilling Solutions, LLC
- EQT Corporation
- Eureka Resources, LLC
- Eurofins Lancaster Laboratories, Inc.
- EXCO Resources (PA), LLC
- FTS International
- Fulbright & Jaworski L.L.P.
- Geosyntec Consultants
- GES
- Glenn O. Hawbaker, Inc.
- Groundwater & Environmental Services Inc. (GES)
- Halliburton Energy Services,
- Heckmann Water Resources
- Hoffman Construction Services, LLC
- HomeWaters
- HRG, Inc.
- Hull & Associates, Inc.
- Hunt Marcellus Operating Company
- K&L Gates LLP
- Keane Group
- Kelchner, Inc.
- LJ Stein & Company, Inc
- Manko, Gold, Katcher & Fox, LLP
- MarkWest Energy Partners, L.P.
- Mascaro Construction Company, L.P.
- Mccarl's Inc.
- McClure Company
- McNees Wallace & Nurick LLC
- McTish, Kunkel & Associates
- Michael Baker Corporation
- Mitsui E&P USA LLC
- Marcellus Shale Coalition
- NBL
- New Pig Energy
- Noble Energy
- Paul C. Rizzo Associates, Inc
- Penn E&R
- Percheron LLC
- PVR Partners
- Range Resources
- Reserved Environmental Services, LLC
- RETTEW Associates, Inc.
- Ridge Global
- RT Energy Services,
- SAIC
- Schneider Downs & Co., Inc.
- Schramm Incorporated
- Seneca Resources Corporation
- Severson Environmental Services, Inc.
- Shell
- Southwestern Energy
- SuitKote Corporation
- SWCA Environmental Consultants
- Talisman Energy USA Inc.
- TestAmerica Laboratories, Inc.
- The Gateway Engineers, Inc.
- The Keane Group
- TRC
- Triana Energy
- Trumbull Energy Services Corporation
- Twilight Services
- Ultra Petroleum Corp.
- Valerus
- Weatherford
- Weavertown Environmental Group
- Weston Solutions, Inc.
- Williams
- WPX Energy
- XTO Energy Inc.

Thank you!

Marcellus Shale Coalition

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