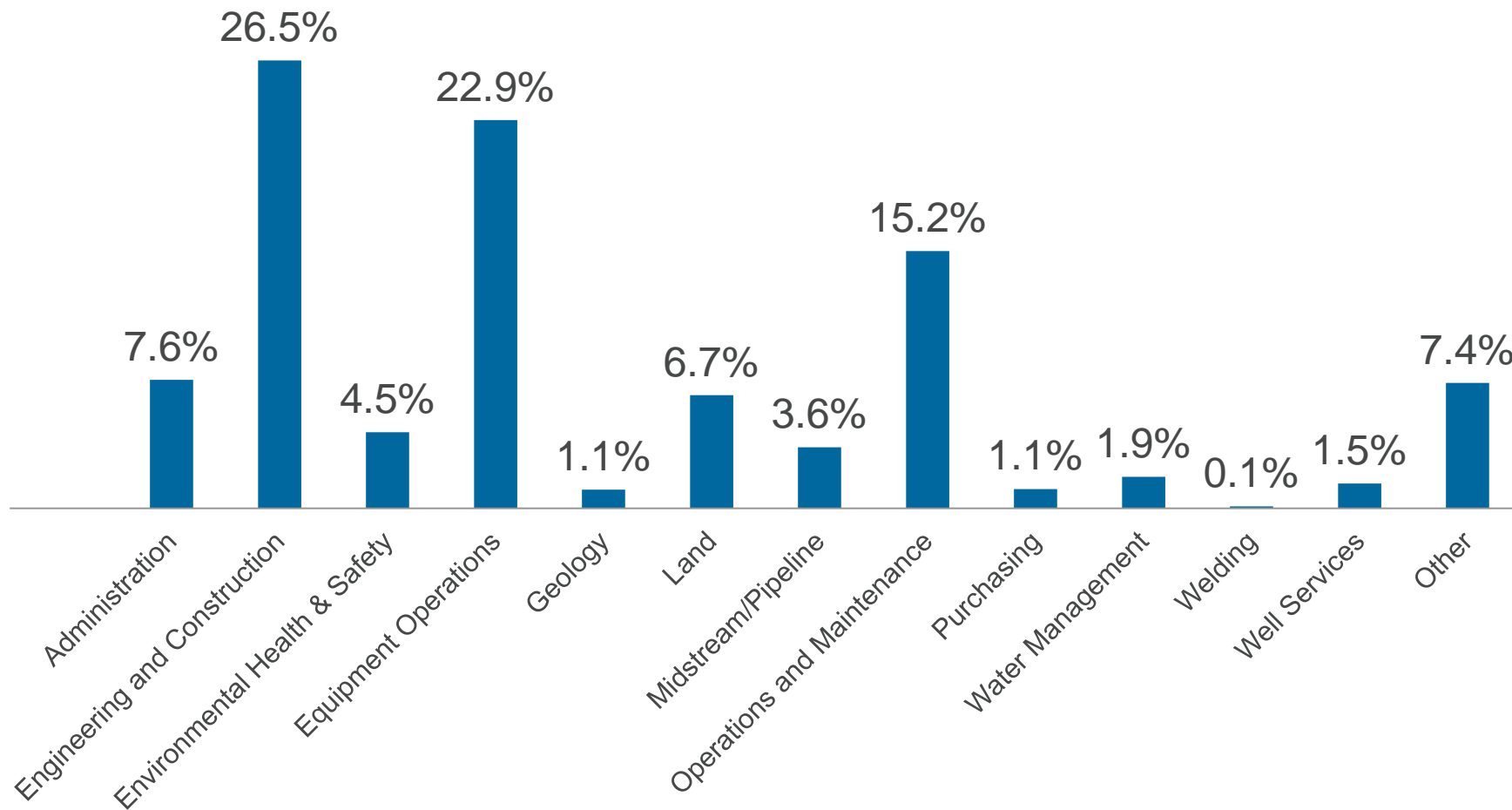


# MSC 2013 Year End Workforce Survey

July 29, 2014



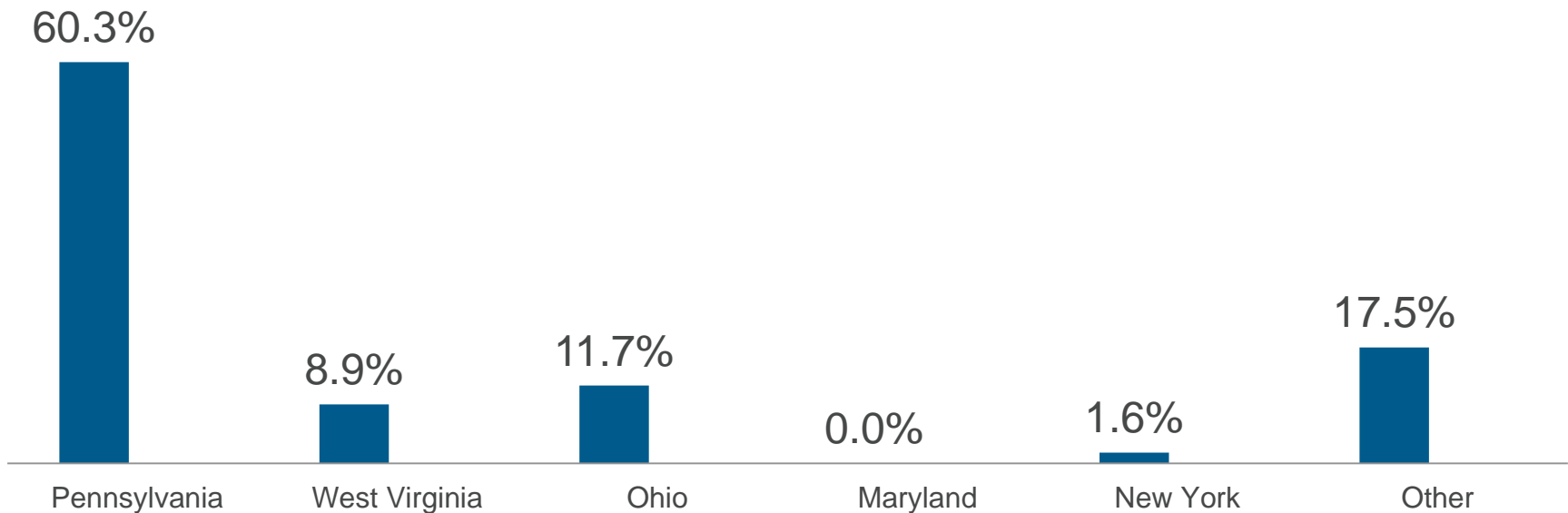
# % Distribution of New Hires in 2013



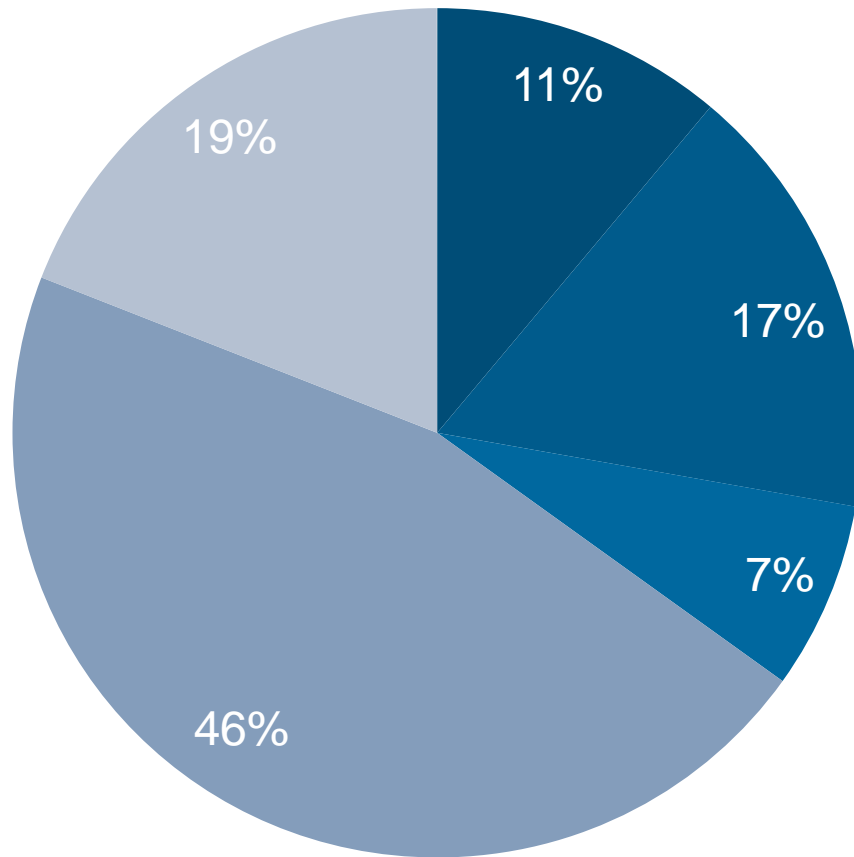
# 83% of New Hires Originated from Marcellus/Utica Shale States in 2013



## Percentage of New Hires from the following Marcellus/Utica Shale States in 2013



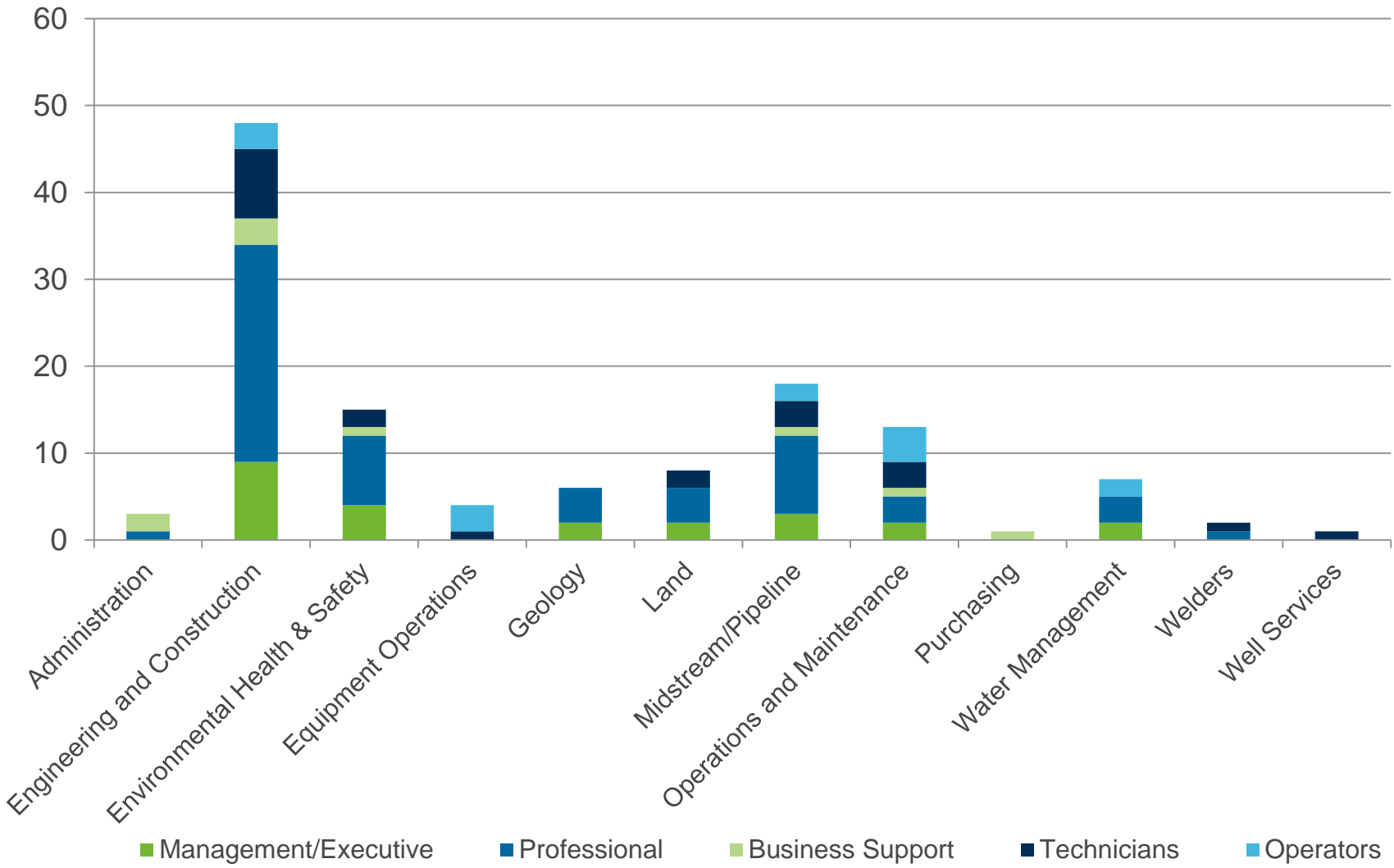
# Of the Most Difficult Positions to Fill in 2013



**46% professional**  
**19% management**

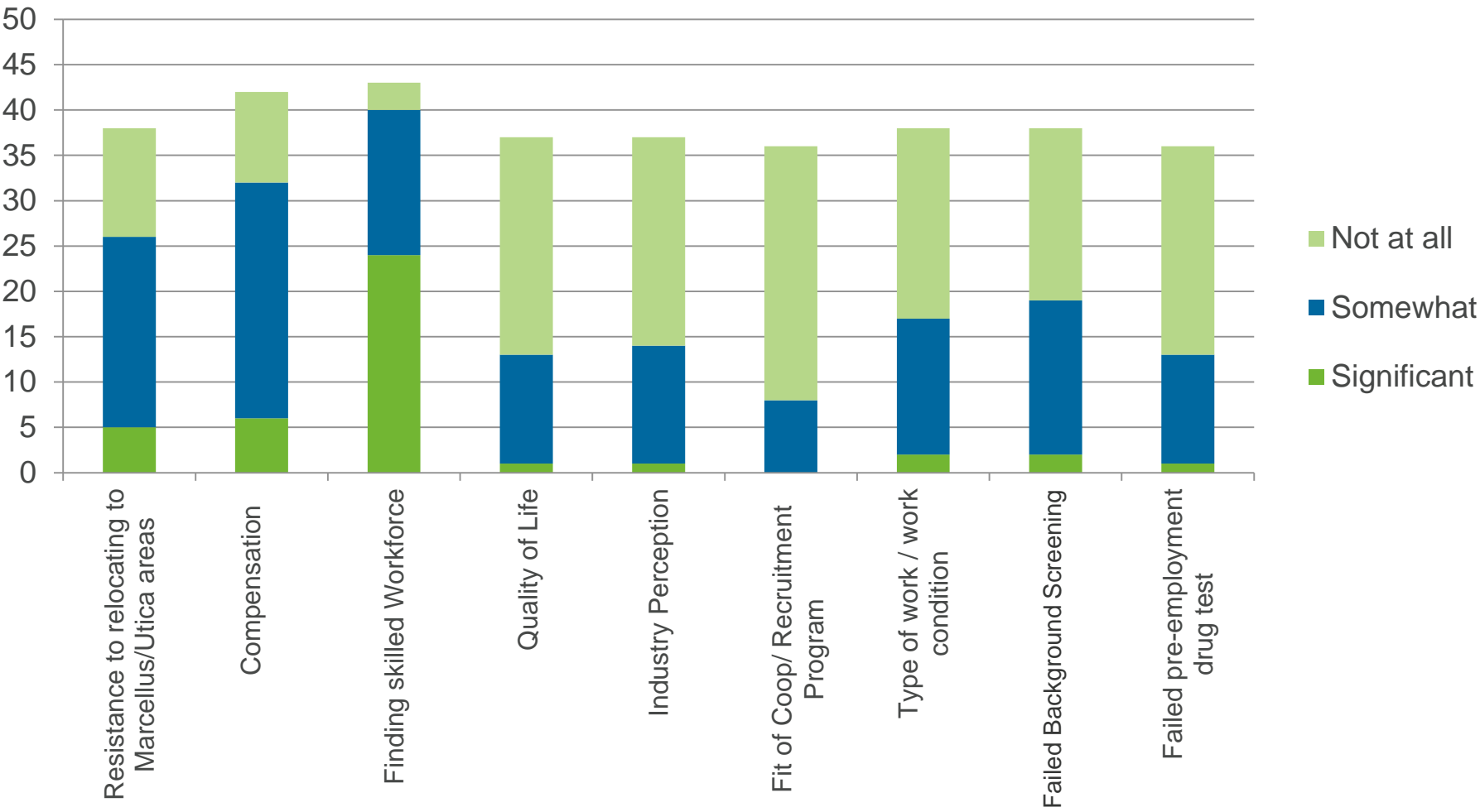
- Operators
- Technicians
- Business Support
- Professional
- Management/Executive

# Positions most difficult to fill in 2013

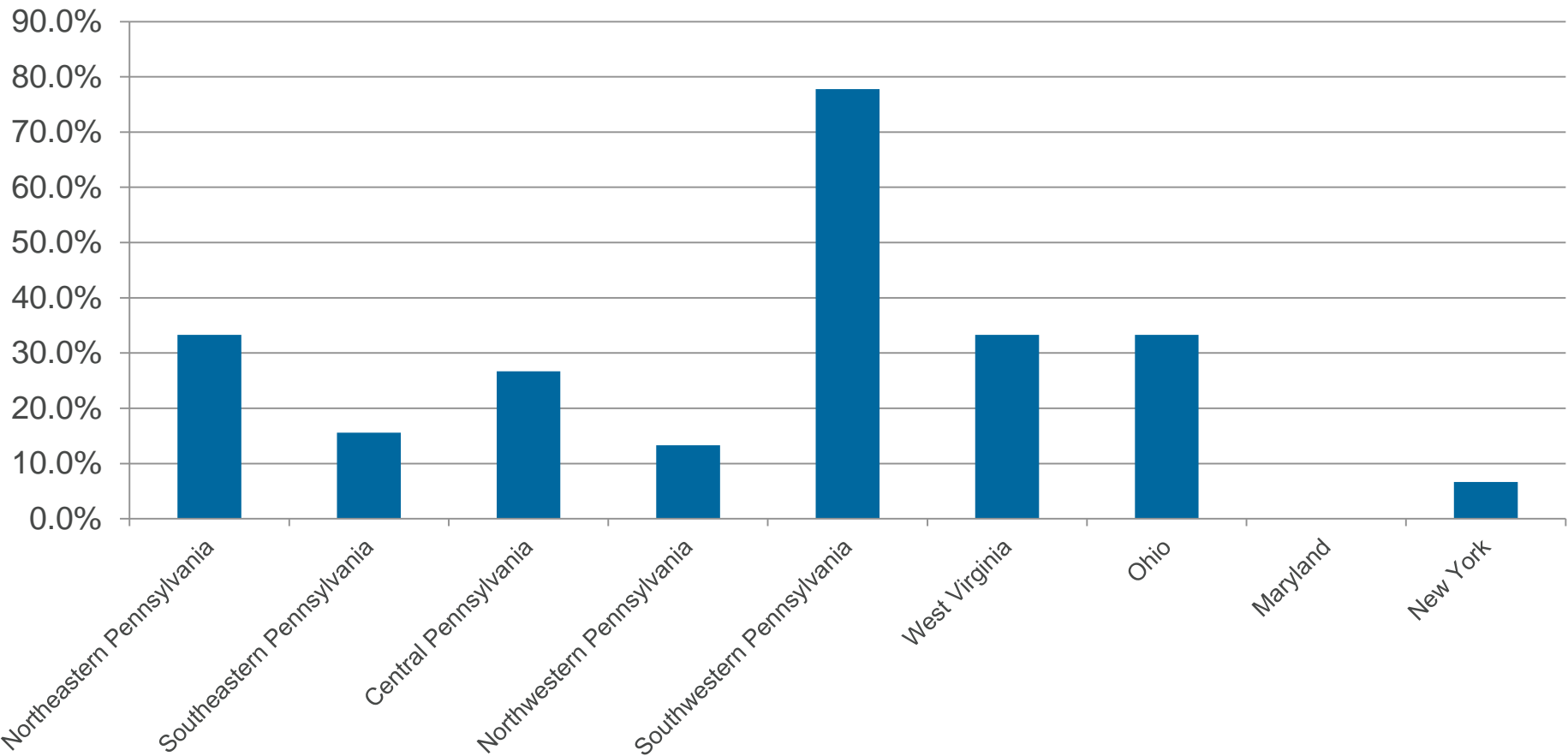


- Qualified Talent (knowledge and experience)
- Competition for Qualified Talent
- Willingness to relocate

# Recruitment Challenges

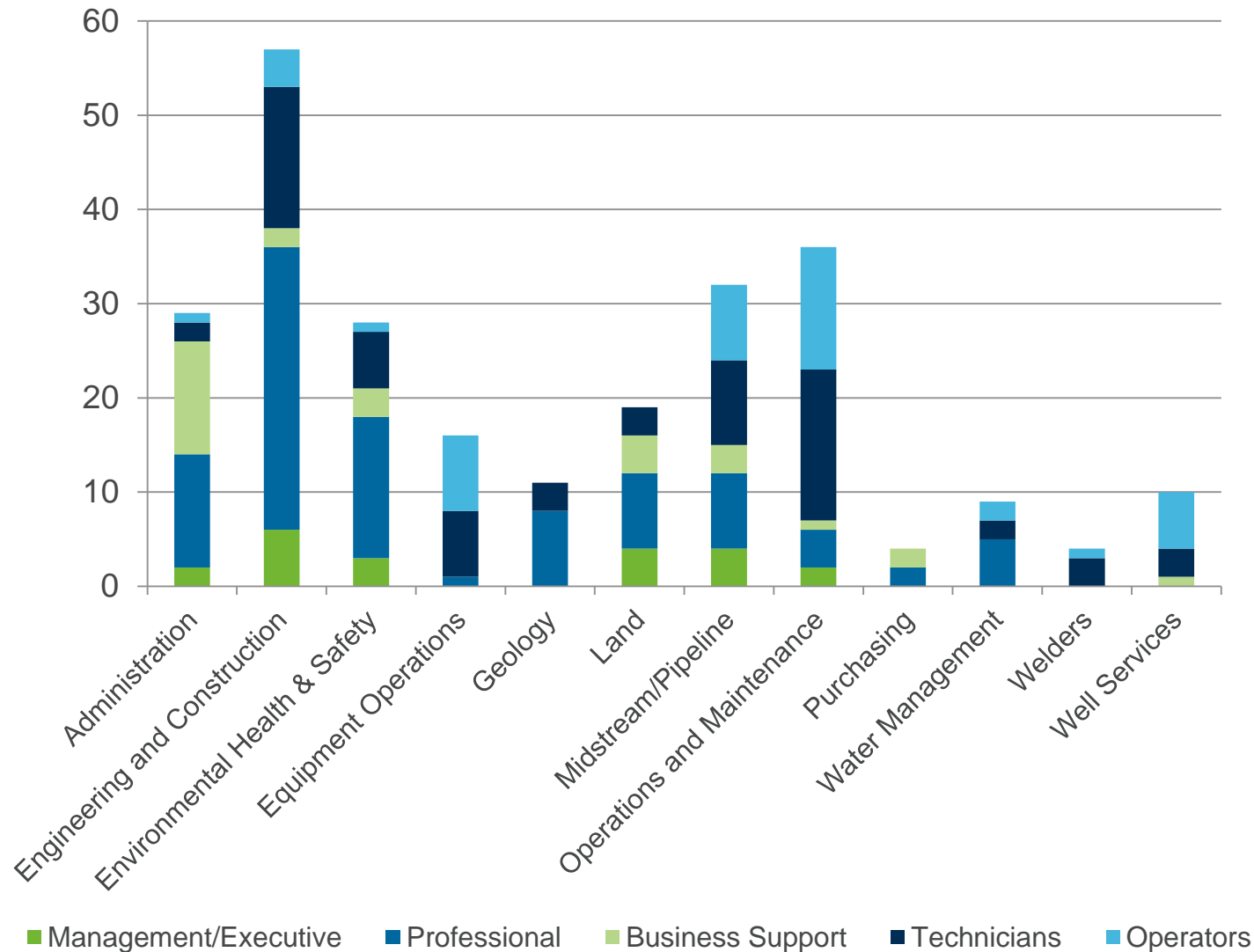


# More Than 2,000 New Hires Expected in 2014 ... in Which Regions?

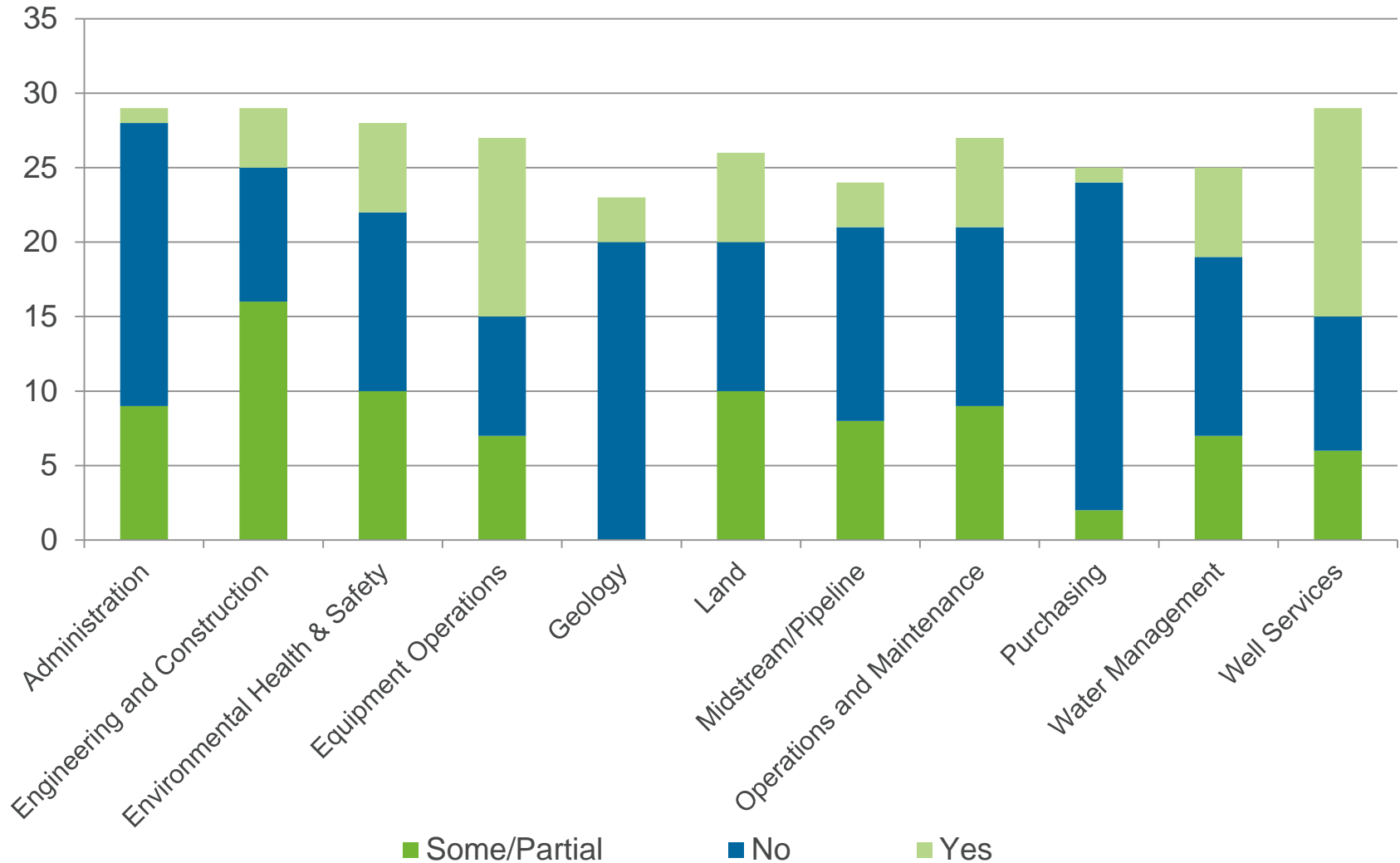




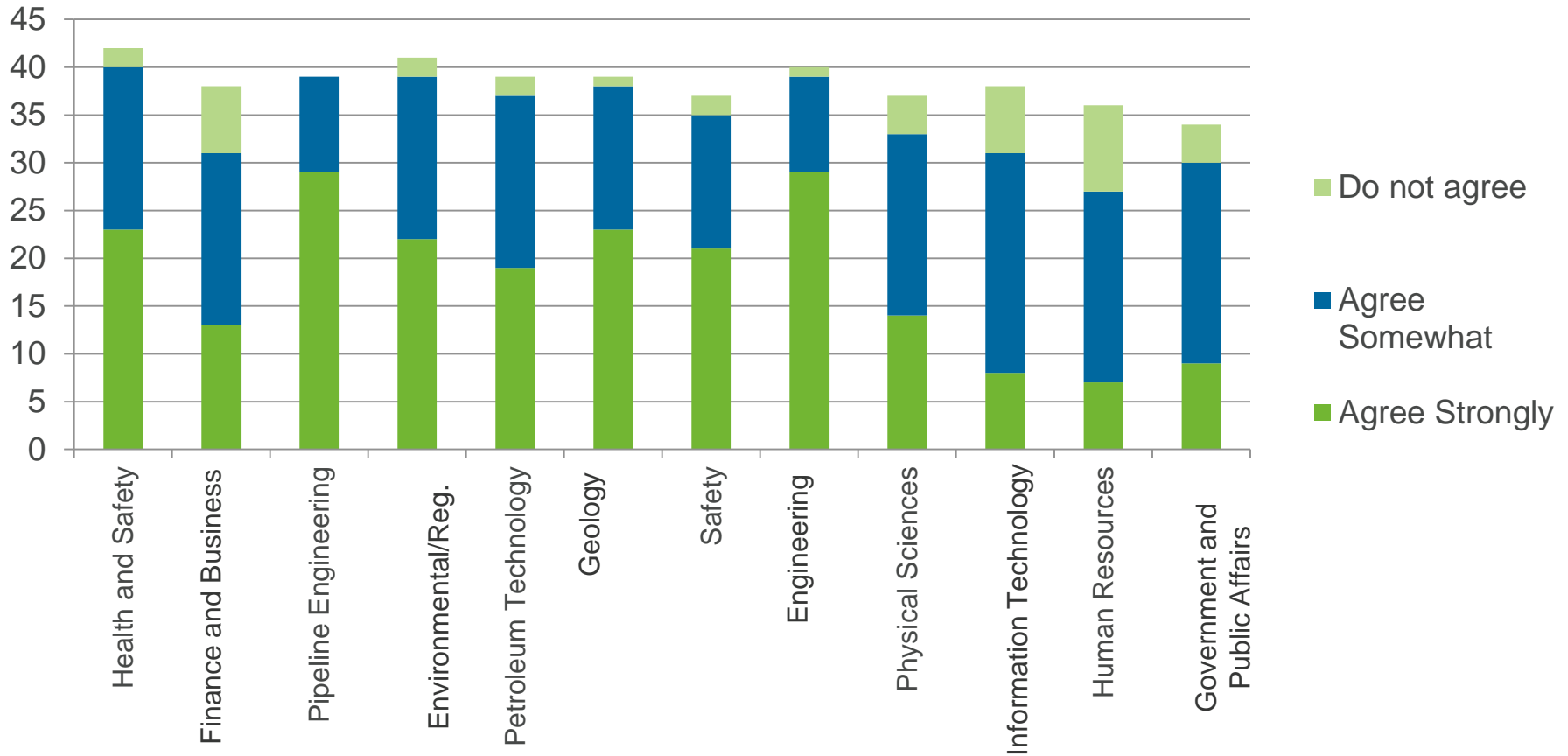
# More Than 2,000 New Hires Expected in 2014 ... in Which Functions?



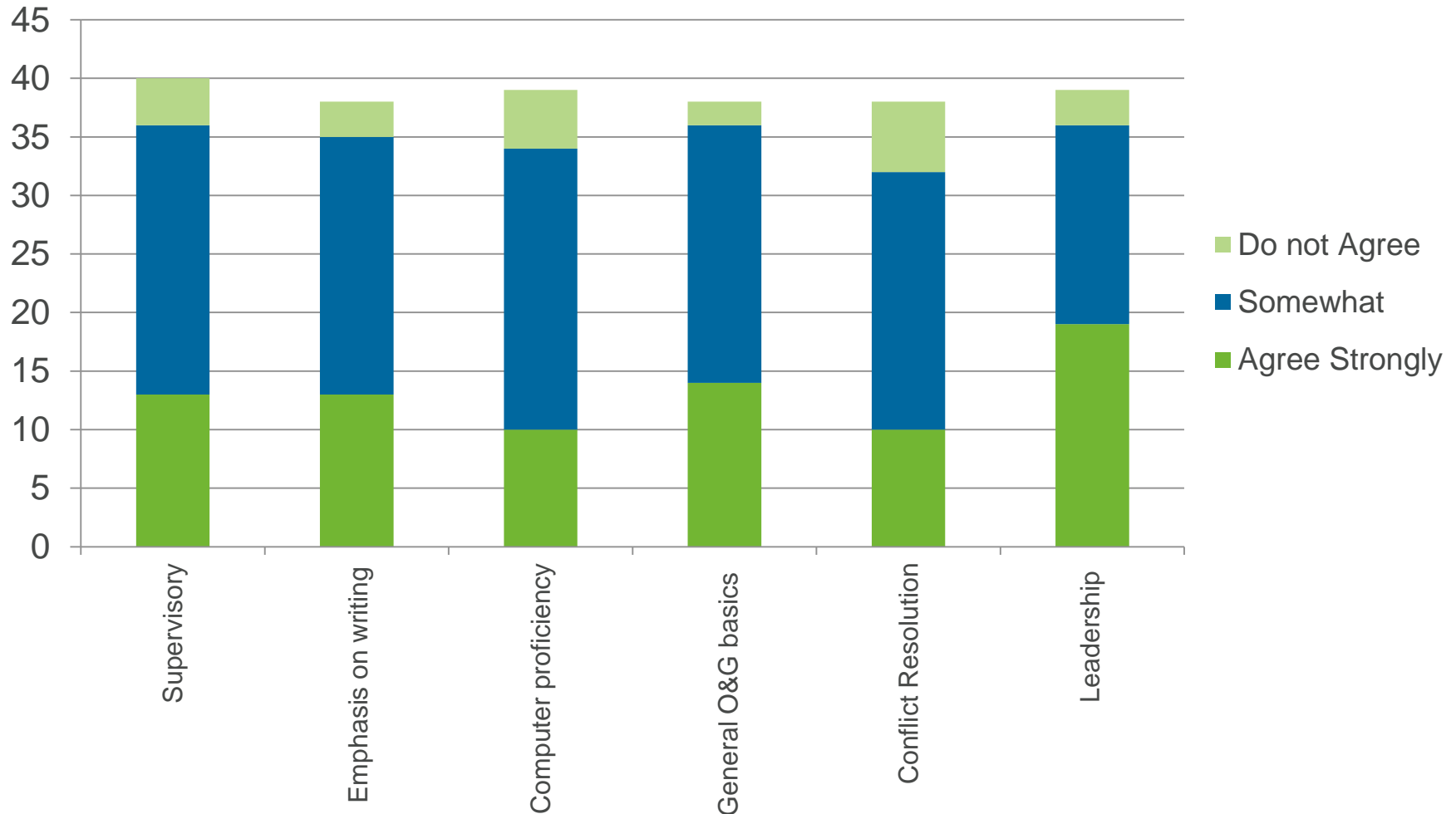
# Outsourcing: Which Functions/Services?

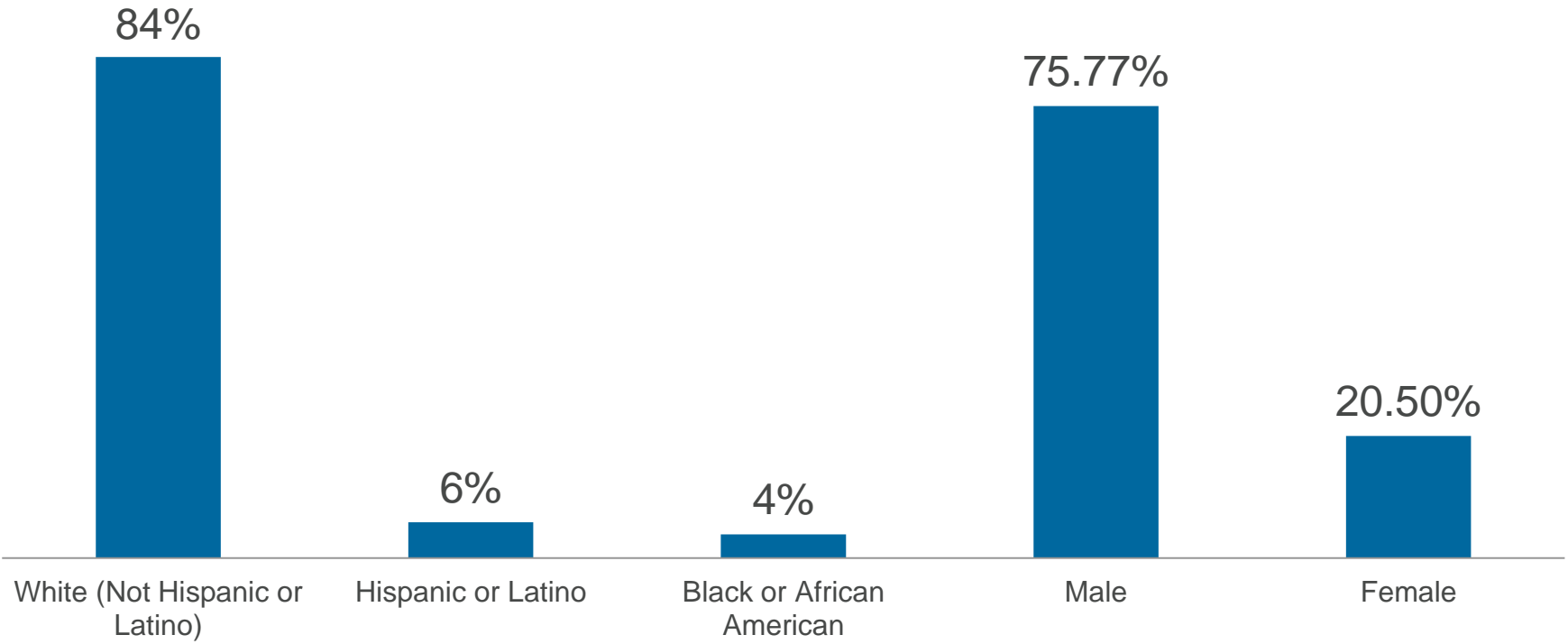


# We Need 4-year Degree Programs Beyond What is Currently Available ...

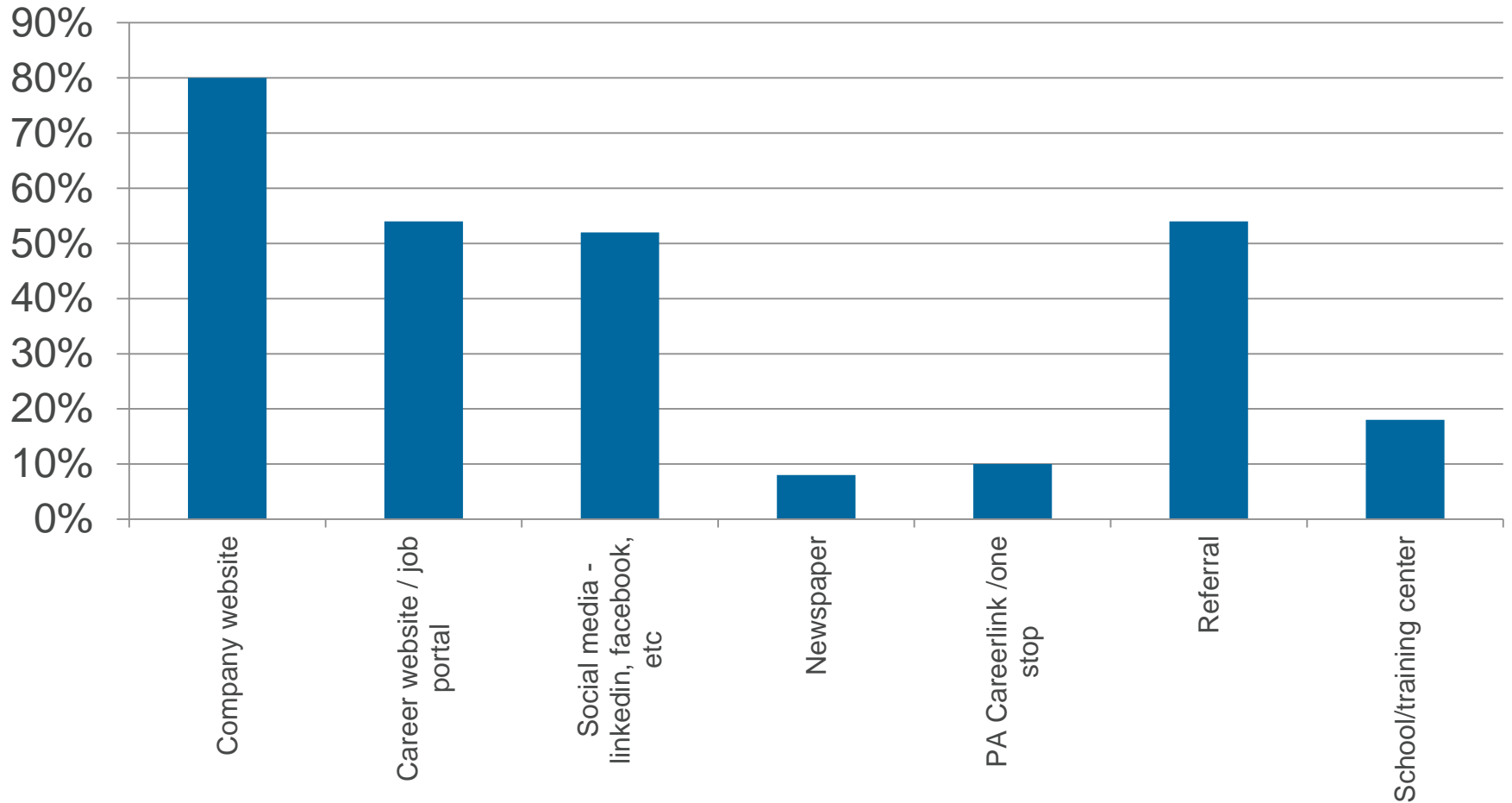


# We Need Certificate Programs Beyond What is Currently Available ...





# Top Recruiting Methods



# 2013 MSC Member Company Participants



- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"><li>▪ Access Midstream Partners</li><li>▪ Anadarko Petroleum Corp.</li><li>▪ Atlas Energy LP</li><li>▪ Bergmann Associates</li><li>▪ Borton Lawson</li><li>▪ Bureau Veritas N. America</li><li>▪ Burleson LLP</li><li>▪ Burnett Oil Co., Inc.</li><li>▪ Cabot Oil &amp; Gas Corp.</li><li>▪ Chesapeake Energy</li><li>▪ Chevron</li><li>▪ Chief Oil &amp; Gas</li><li>▪ Cleveland Bros. Equip. Co.</li><li>▪ CMS Energy</li><li>▪ CONSOL Energy</li><li>▪ CSD Engineers, LLC</li><li>▪ Energy Corp. of America</li><li>▪ Entech Engineering, Inc.</li><li>▪ EOG Resources, Inc.</li><li>▪ EQT Corporation</li><li>▪ EXCO Resources (PA), LLC</li></ul> | <ul style="list-style-type: none"><li>▪ Fisher Associate PE LS LA PC</li><li>▪ FTS International</li><li>▪ Highway Equipment Company</li><li>▪ Holloman Corporation</li><li>▪ Hull &amp; Associates, Inc.</li><li>▪ Hunt Marcellus Operating Co.</li><li>▪ Larson Design Group</li><li>▪ Laurel Aggregates</li><li>▪ Marcellus Shale Coalition</li><li>▪ MarkWest Energy Partners</li><li>▪ McCarl's Inc.</li><li>▪ McClure Company</li><li>▪ McNees Wallace &amp; Nurick LLC</li><li>▪ Natural Resource Group, LLC</li><li>▪ Noble Energy</li><li>▪ Northwest Savings Bank</li><li>▪ Norton Rose Fulbright</li><li>▪ Nuverra</li><li>▪ Paul C. Rizzo Associates, Inc</li><li>▪ Percheron</li><li>▪ Philadelphia Energy Solutions</li></ul> | <ul style="list-style-type: none"><li>▪ PVR Partners</li><li>▪ Range Resources</li><li>▪ Ridge Policy Group</li><li>▪ RT Environmental ServicesS&amp;ME Inc</li><li>▪ Seneca Resources</li><li>▪ Shell Appalachia</li><li>▪ Southwestern Energy</li><li>▪ Specialized Desanders Inc.</li><li>▪ Summit Discovery Resources LLC</li><li>▪ Talisman Energy USA, Inc.</li><li>▪ TenCate Geosynthetics</li><li>▪ TestAmerica</li><li>▪ Tetra Tech, Inc.</li><li>▪ The Gateway Engineers, Inc.</li><li>▪ Trinity Consultants</li><li>▪ UGI Energy Services</li><li>▪ Weavertown Transport Leasing, Inc /Environmental</li><li>▪ WPX Energy</li><li>▪ XTO Energy</li></ul> |
|--|---|---|

# Thank you!

**MSC**

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