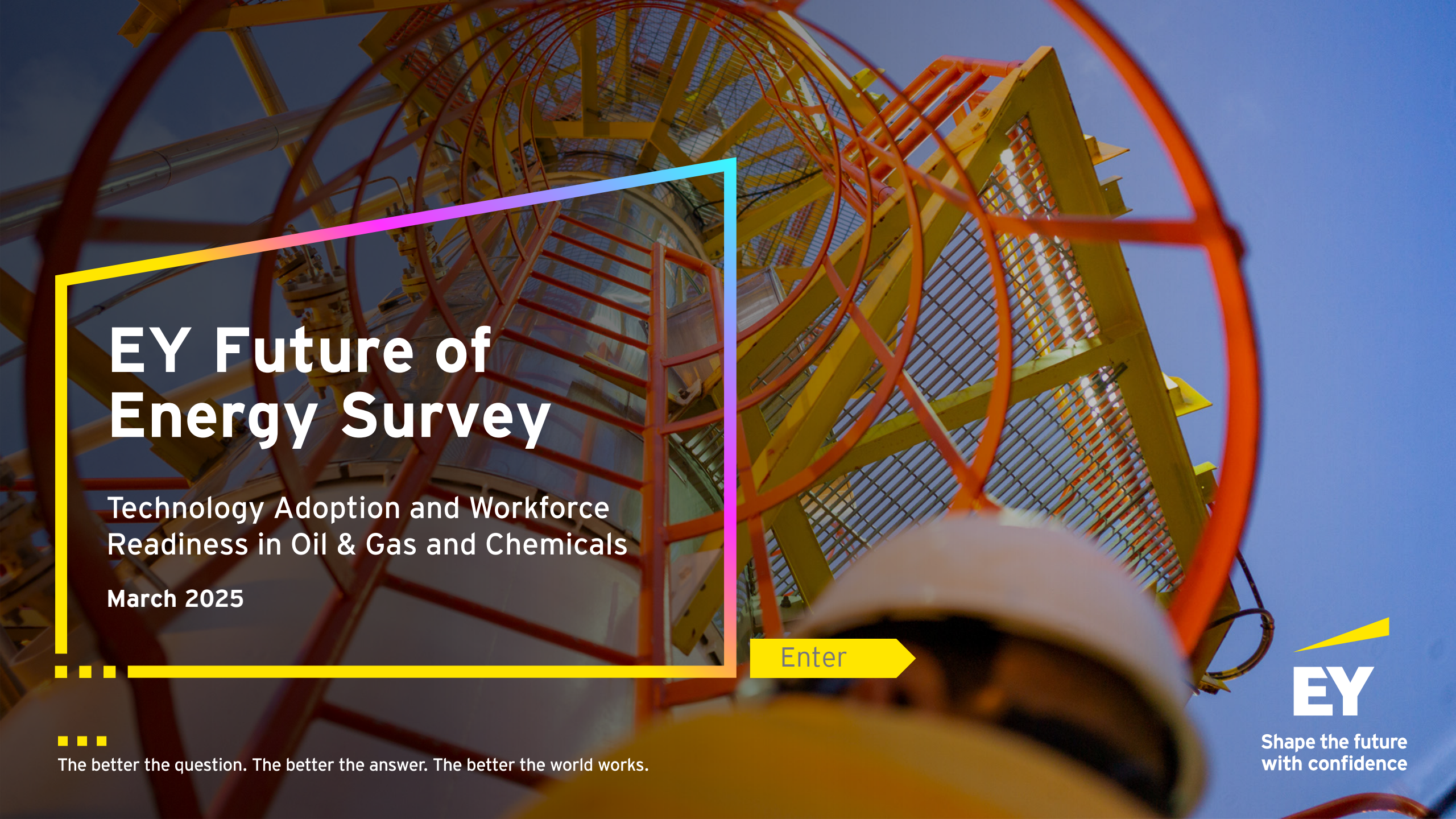


EY Future of Energy Survey

Technology Adoption and Workforce Readiness in Oil & Gas and Chemicals

March 2025

Enter

The better the question. The better the answer. The better the world works.

Shape the future with confidence

Five years ago, we sounded an alarm: while energy companies were making substantial investment in digital technology, they did not have a complementary plan to upskill their workforce to fully realize returns on those investments. In 2025, our EY Future of Energy survey shows how companies have progressed their technology adoption and workforce readiness and illuminates new challenges on the horizon.

Amid strong commodity prices and energy demand growth, slightly more than half of Oil & Gas and Chemicals executives surveyed say adoption of new technologies will have the largest positive impact on their industry. Further, they plan to invest a "great deal" or "moderate" amount in digital technologies over the next five years.

However, when asked about specific core and innovative technologies, very few respondents say these technologies have "met expectations." Bridging this investment to expectation gap is critical as Oil & Gas and Chemicals companies focus on driving production and profitability.

To achieve meaningful results, companies must first have clear value-specific goals for their technology investments. They should also consider a bi-modal strategy for technology investments, with an approach that delineates core and innovation-focused tools and systems, working to ensure the proper resources are dedicated to both in a manner that supports and strengthens both short- and long-term performance.

Additionally, they must work to ensure the workforce — whether within their company, their contingent workforce, or third parties and vendors — has the right skills to realize those investments and connect the dots across the broader organization. As technology moves at light speed and investments soar, it will require a human-centered approach to maximize impact.

Technology will have the largest impact on the industry

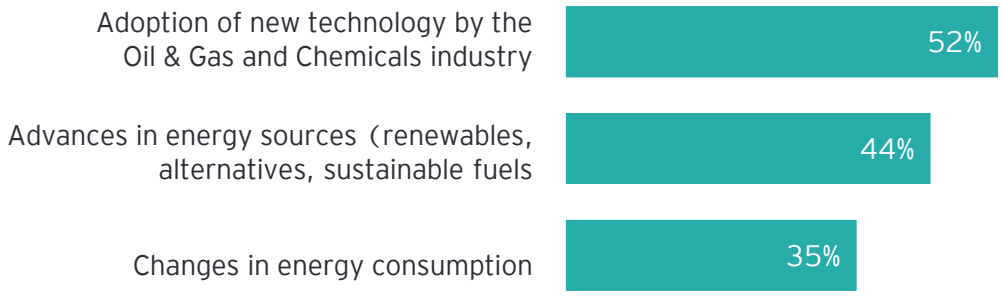
The Oil & Gas and Chemicals industry is in the early, challenging stages of a technological revolution, with over half (52%) of respondents believing the adoption of new technologies will yield the most significant positive impact in the next five years. This sentiment reflects a growing awareness of how digital advancements can enhance operational efficiency, reduce costs, and promote sustainability in an increasingly competitive landscape.

Further, nearly half of respondents (49%) say they plan to invest a great deal in digital technologies, marking a sizeable 20-point increase since our *2020 Oil & Gas Digital Transformation and the Workforce Survey*. This shift underscores technology's criticality amid evolving market demands and regulatory pressures.

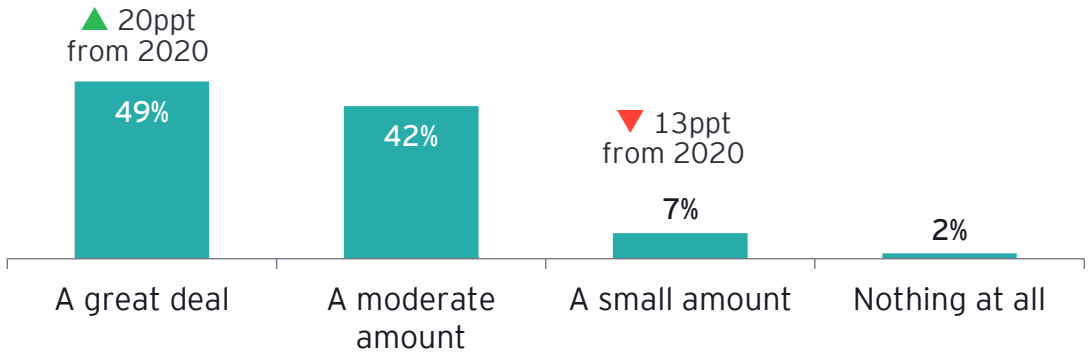
The transformative impact technology can have on the industry is clear. Advancements in artificial intelligence (AI), machine learning (ML) and data analytics will enable companies to optimize the entire value chain. Whether it is integration of real-time monitoring of equipment and environmental conditions, significantly improving safety protocols, or reducing downtime, innovations in automation and robotics can streamline operations, increasing precision and reducing human error.

With smart investments and a proper balance between optimizing core technologies to remove costs and increase efficiency — as well as piloting, producing and scaling innovative technologies — Oil & Gas and Chemicals companies can secure a competitive advantage.

Which three trends will have the most positive impact on your organization in the next five years?



How much does your organization plan to invest in digital technologies to keep pace with these trends?



Workforce skills are developing, but companies struggle to scale technology and capture value

87% Our ability to reskill is a competitive advantage

83% Hiring and retaining workers proficient in new technologies is a major challenge

85% We have difficulty moving from single use cases to organizational scale

As organizations navigate the rapidly changing landscape of workforce skills, our survey reveals a significant gap between ambition and execution. Without a proactive approach, the skills gap will continue to grow leaving organizations unable to meet evolving demands.

While 87% of respondents recognize their ability to reskill as a competitive advantage — a remarkable 12-percentage point (ppt) increase since 2020 — fewer than one-third are actively retraining existing employees. Notably, 25% of respondents expect their workforce to acquire new skills on the job, highlighting a reliance on informal learning rather than structured development programs.

Yet, as organizations invest in and implement technologies, the shortage of adequately trained employees can hinder progress. Workforce readiness can contribute to challenges in scaling technology solutions beyond single-use cases and make it difficult for teams to ensure their investments yield tangible value.

The current landscape of technology in projects reveals a complex interplay between rising costs and the need for value attribution. As IT and digital spending continues to increase, managing expenses and maximizing the impact of their investments will be paramount.

When employees are equipped with the right skills, they can optimize processes, solve complex challenges, and ultimately contribute to the company's bottom line, helping to ensure technology investments yield maximum returns and maintain a competitive edge in the industry.

Companies must prioritize comprehensive reskilling initiatives that equip employees and foster a culture of continuous learning — equipping the workforce with new capabilities and mindsets to work in entirely new ways. By investing in their workforce, organizations can better position themselves to adapt to changing market conditions and fully leverage technological advancement.

CONTENTS

1 Technology adoption

Evolution and experimentation

Improving adoption and scaling value

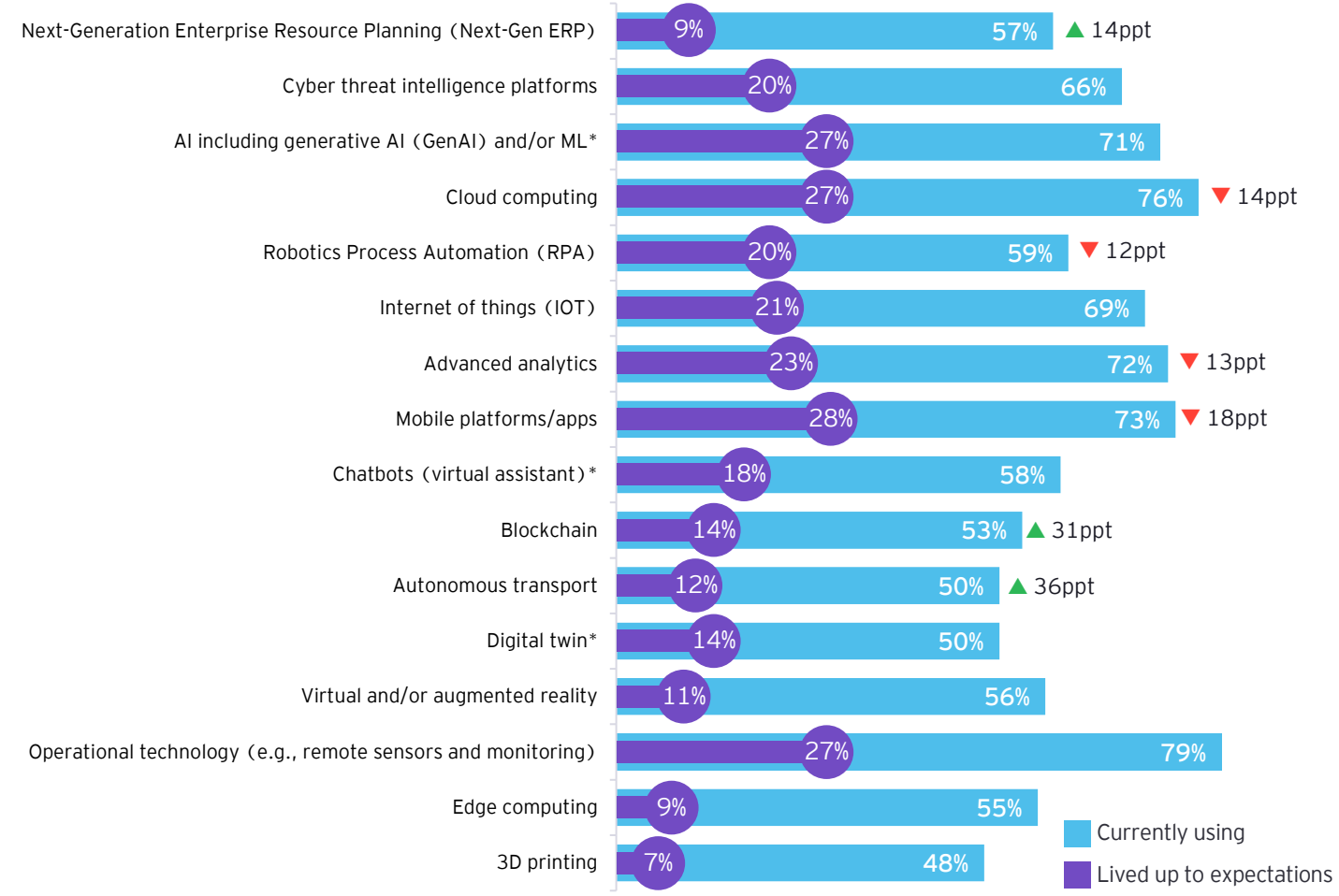
The technology landscape reveals a complex interplay between rising costs and the need for value attribution. Pressure to connect technology investment to tangible benefit will continue to increase.

Only 27% of executives are realizing their expectations of core technologies like cloud computing, while just 27% say emerging technologies such as AI are delivering on their promise. Interestingly, this gap exists even in areas with strong examples of technology that is driving efficiency, value and improved safety, such as the use of digital twins.

The industry prioritizes established practices over innovation, fostering a culture resistant to change. This is reflected in the survey results – companies are failing to realize the full value of their technology investments due to a lack of clarity on the technology's value, poor integration, misalignment with business goals and organizational resistance to change due to this risk aversion and preference for predictability.

Without a clear roadmap, cross-functional collaboration and a real commitment to culture change, these struggles to achieve tangible business value are likely to persist.

Which of the following technologies is your organization is currently using, and have they lived up to your organization's expectations?



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Due to rounding, some totals may not equal the sum of distinct figures.

Adoption challenges

Balancing experimentation, efficiency and progress

There are numerous barriers blocking companies from achieving the expected value of technology investments, and they stem from a mix of industry-specific challenges and organizational inertia.

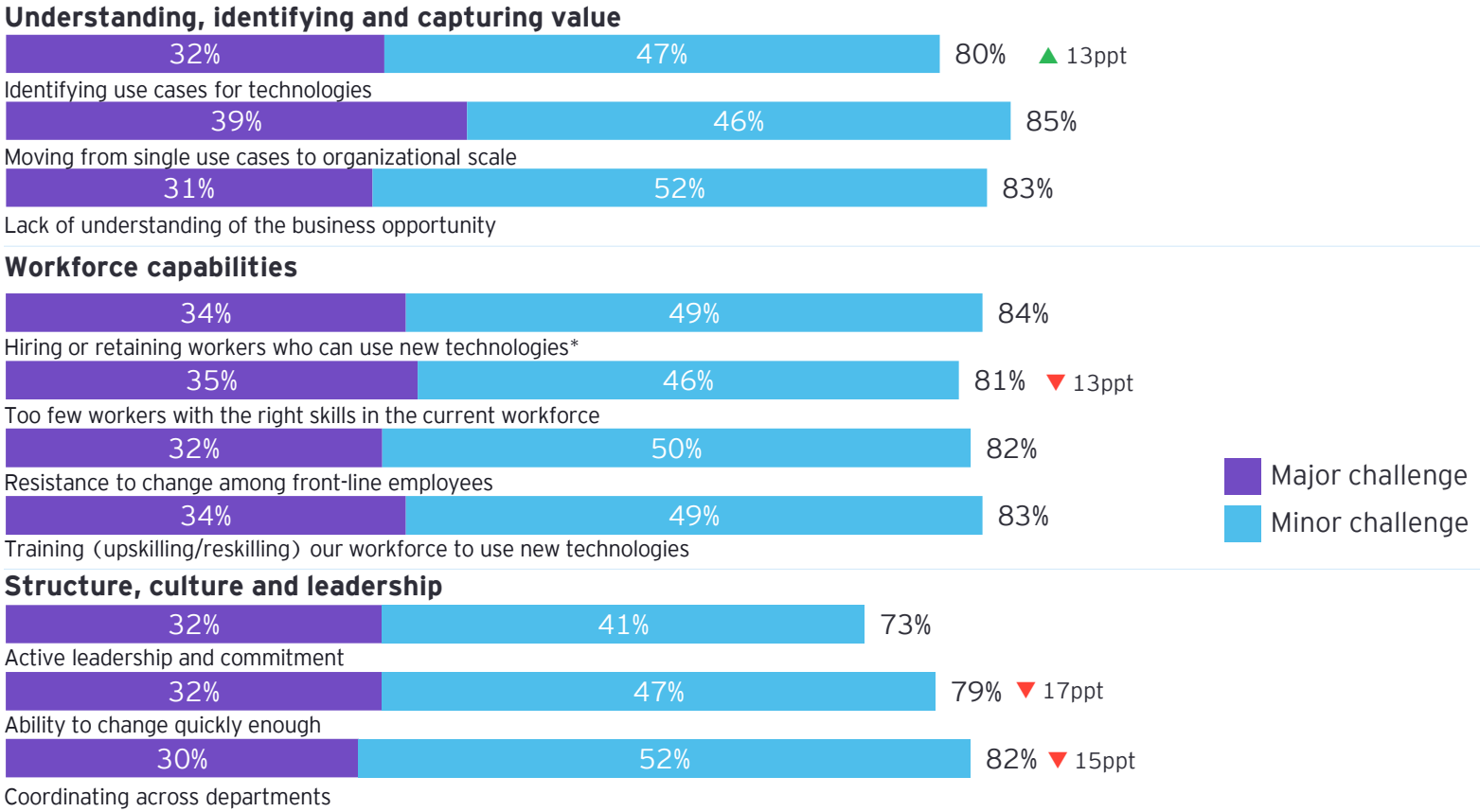
Several of these challenges demonstrate a key theme – the disconnect between the desire to implement digital capabilities and where those technologies can deliver the most value, both for the worker and the business.

For example, 83% cite the lack of understanding of business opportunities as a challenge. Further, 85% cite the difficulty of scaling successful pilot projects into organization-wide implementations.

Ultimately, a business with a technology strategy, but a workforce limited by the right skills and focus, leads to unscalable tools and value leakage. Further, prioritizing a more holistic strategy – balancing foundational tech with more nascent digital tools – and a workforce enablement plan to match is critical.

Successfully integrating advanced technologies requires not only substantial financial investment but also a skilled workforce adept at managing and leveraging these innovations effectively.

How much of a challenge to digital technology adoption is each of the following for your organization?



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Skills and adoption

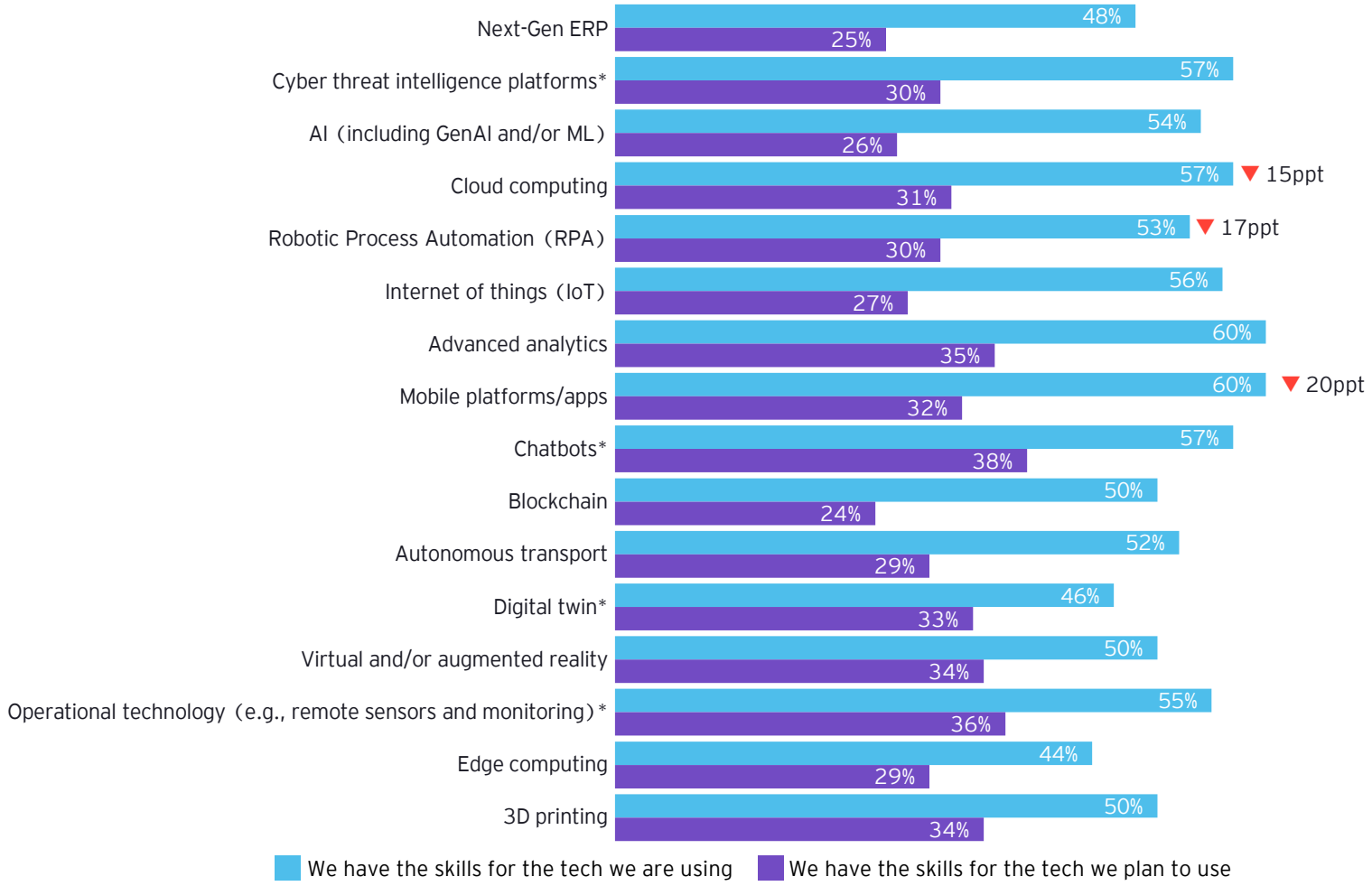
Setting the foundation for value from technology investments

The availability of digital skills is increasing – particularly in cloud computing (85%), data analytics (82%), digital literacy (82%) and AI (77%), with many skills having doubled since our 2020 survey. humans' not all companies are seeing this progress – only 76% of respondents are utilizing cloud computing, 71% are using AI, 53% have adopted blockchain and 50% are implementing digital twins.

As more companies seek to adopt and scale these technologies, the demand for skilled professionals will almost surely grow. Notably, 96% of organizations are either implementing or developing new applications for AI, 92% for blockchain and digital twins, and 91% for cloud computing over the next five years. Further, as technology evolves so will humans' interactions with it. Thus, as the work itself changes, people need the right skills and capabilities to deliver value in entirely new environments.

However, fewer than half of current users feel they possess the necessary skills to maximize the value of their technology investments. Just over half of respondents report having the right skill levels, and only about one-third of planned users are confident in their capabilities, indicating the urgent need for upskilling.

Does your workforce currently have the skills it needs to realize the investment in this technology?



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Competitive advantage

Moving from hype to hyperscaler

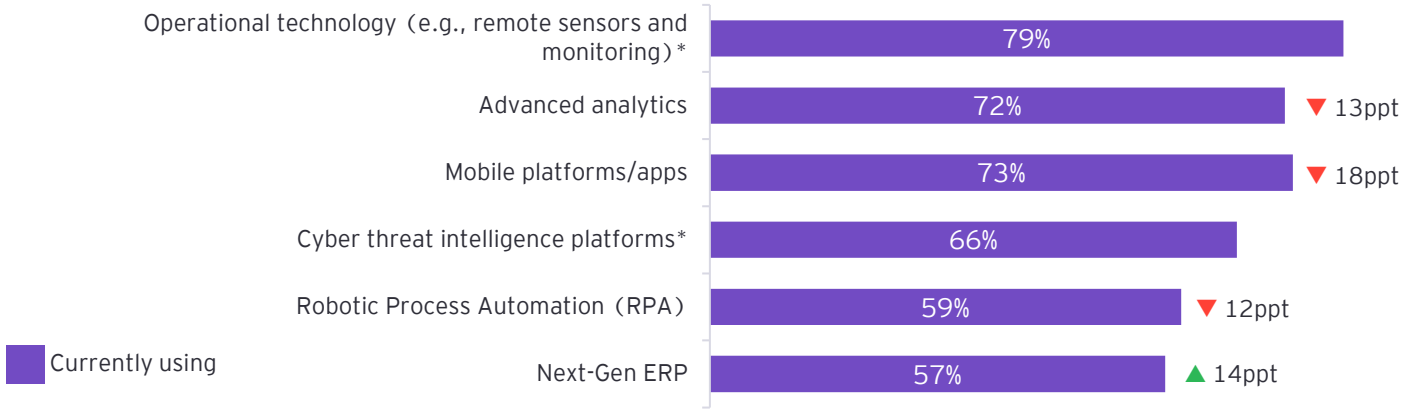
It is clear that core and innovative technologies still have substantial potential to transform Oil & Gas and Chemicals companies.

Only 79% of respondents are using operational technology (e.g., remote sensors) and 72% are using advanced analytics to inform their business – a 13ppt drop from 2020, despite industrial scale use cases to improve operations. Similar drops in mobile apps and automation technologies were reported. Yet, of those not using the technologies, the majority are either in the process of developing it or plan to.

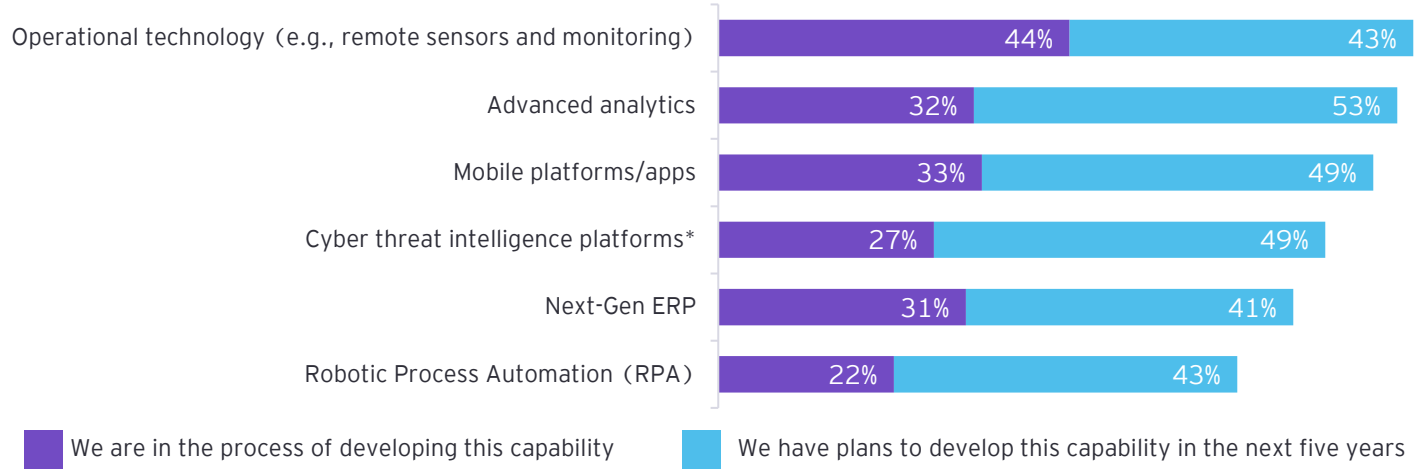
Eighty-five percent (85%) of respondents told us their ability to adopt these technologies will be a competitive advantage, which underscores the urgency to do more to achieve the intended return in investment.

As companies invest in these technologies, they are not only preparing for future challenges but also unlocking new opportunities for innovation, efficiency, and enhanced customer experiences.

Which of the following technologies your organization is currently using?



If you are not using these technologies, do you plan to?



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2 Workforce readiness

Pace of skills and technology

Growing skills to match investments

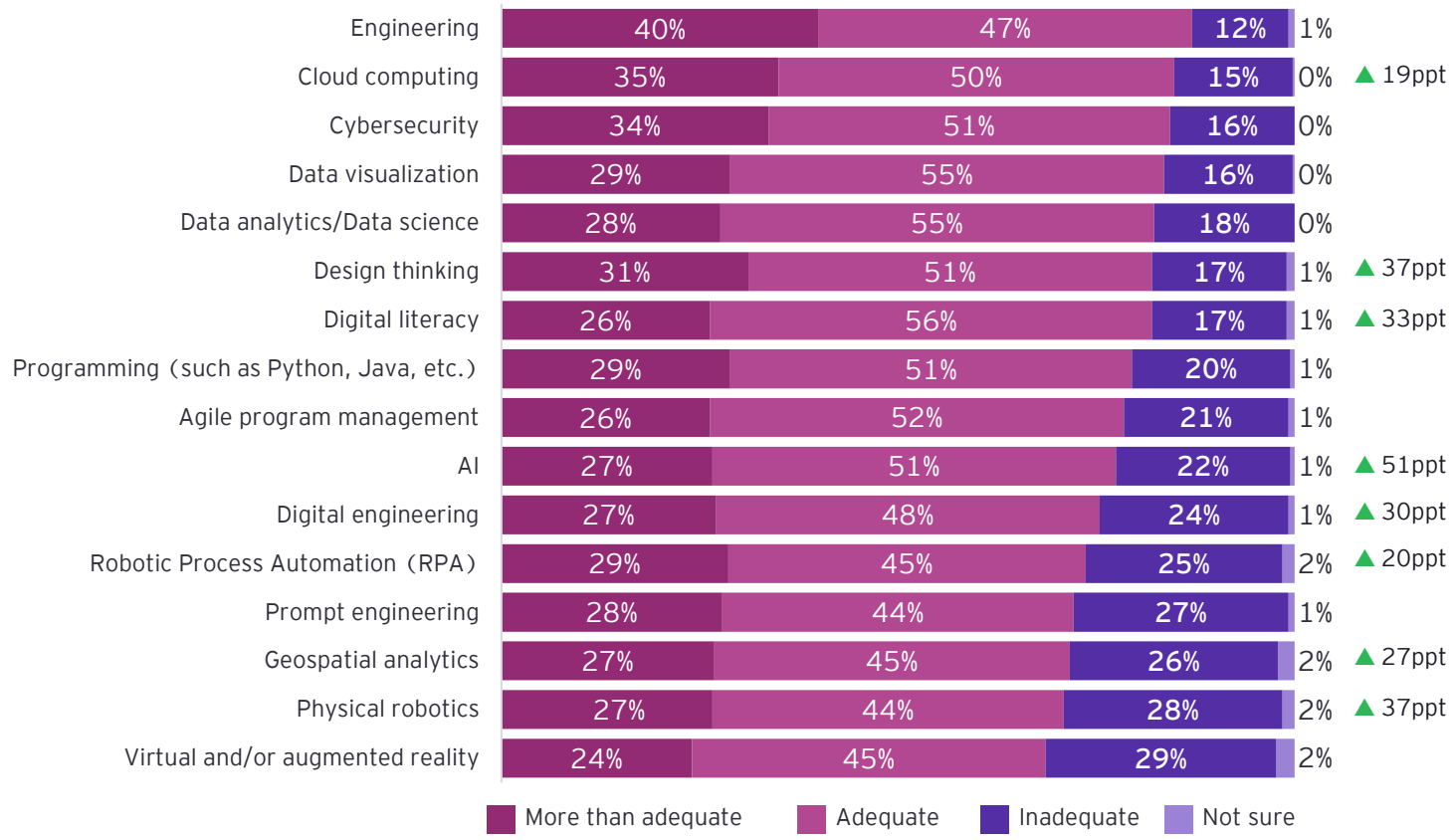
The astounding speed at which new technologies are emerging, particularly outside of major ERP platforms, poses a significant challenge for Oil & Gas and Chemicals companies striving to keep pace.

Rapid advancements in IoT, AI and other end-use computing tools, with new releases every 12 to 18 months, require workers to continuously upgrade their skills and experience to maximize their effectiveness. Consequently, while the availability of digital skills is increasing, it often does not align with the pace of technology adoption and scaling ambitions.

As technologies such as cloud computing, blockchain, and digital twinning continue to expand – both among existing users and new adopters – the demand for employees with relevant skills will only intensify. These advancements also mean how employees and technology interact is ever-evolving, and the skills and responsibilities employees must have relevant to the technology is constantly changing too.

These transformative dynamics highlight the need for organizations to invest in ongoing training and development to help ensure their workforce can fully leverage emerging technologies.

How readily available is each skill in your current workforce relative to organization's needs today?



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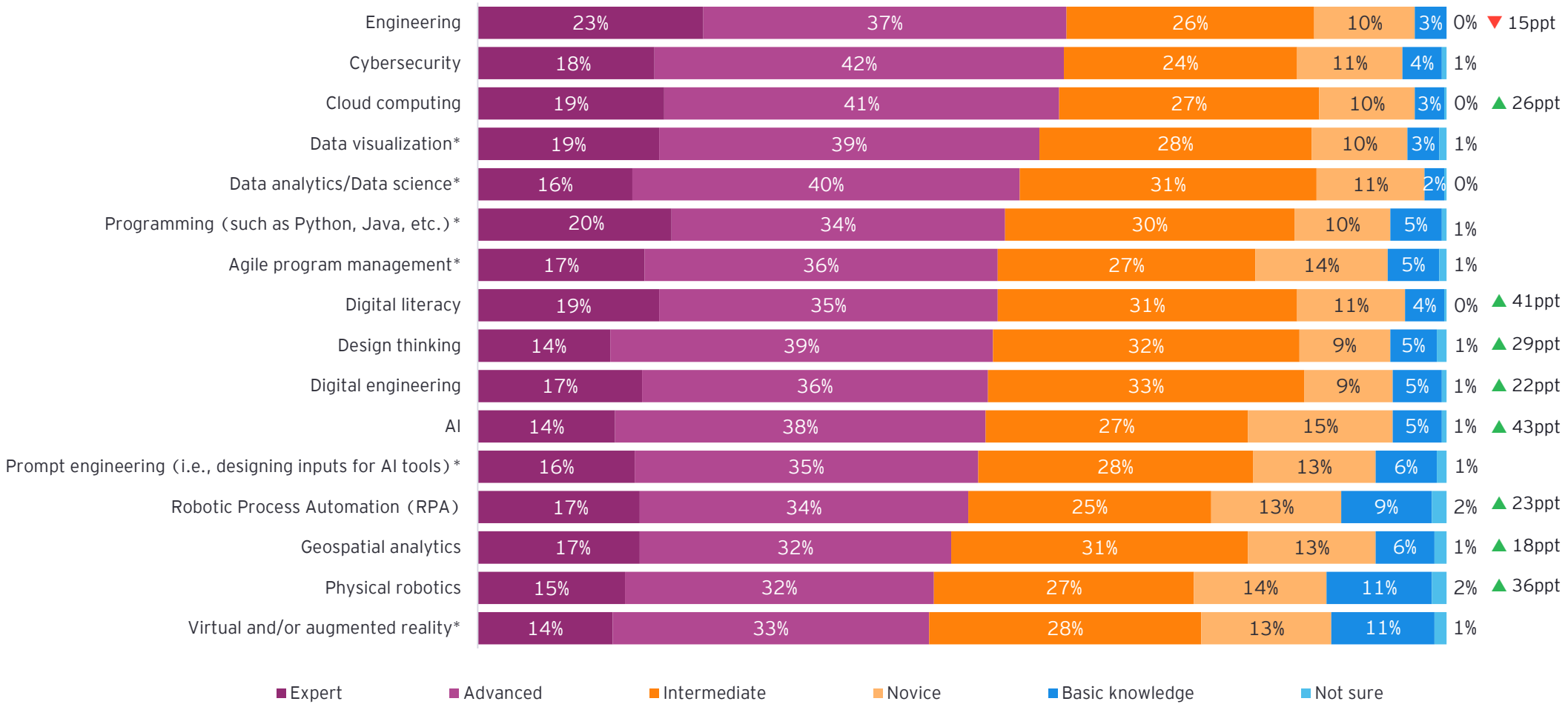
How would you rate your organization's current level of maturity for each skill?



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Capital investment

Investing in tech without workforce limits value

Investing in technology without a corresponding plan to enhance workforce skills can lead to significant value leakage for organizations.

While more than three-fourths of respondents believe they are ahead of the competition in preparing their workforce for the digital future, the survey reveals a more complex reality regarding skill availability and retention.

Two-thirds of respondents struggle to retain employees with in-demand skills, and more than 81% acknowledge the need to adopt different recruiting strategies to maintain a competitive edge. Furthermore, 82% of respondents identify hiring and retaining workers proficient in new technologies as a challenge, with a similar percentage noting a shortage of workers possessing the right skills within their current workforce.

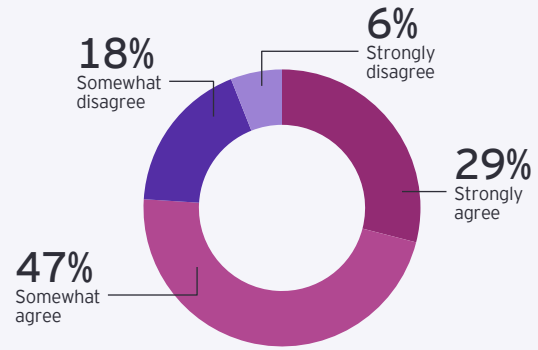
This disconnect highlights the critical need for organizations to formalize their workforce transformation efforts and align them with capital investments in technology.

81%

▲ 27ppt from 2020

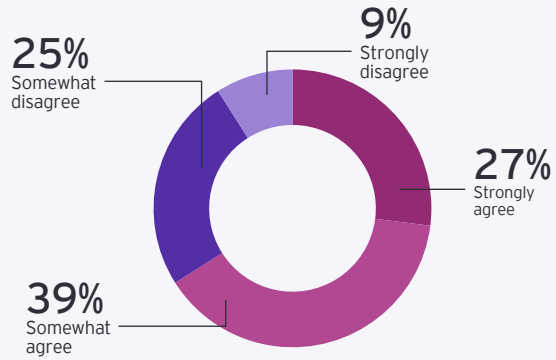
Our workforce is agile enough to respond to changing business needs

We are ahead of our competition in building a workforce for the digital future



Total agree: 76%
▲ 34ppt from 2020

It is difficult to keep people with in-demand skills in our organization



Total agree: 66%
▲ 16ppt from 2020

Workforce readiness

Taking a cohesive approach to addressing skills needs

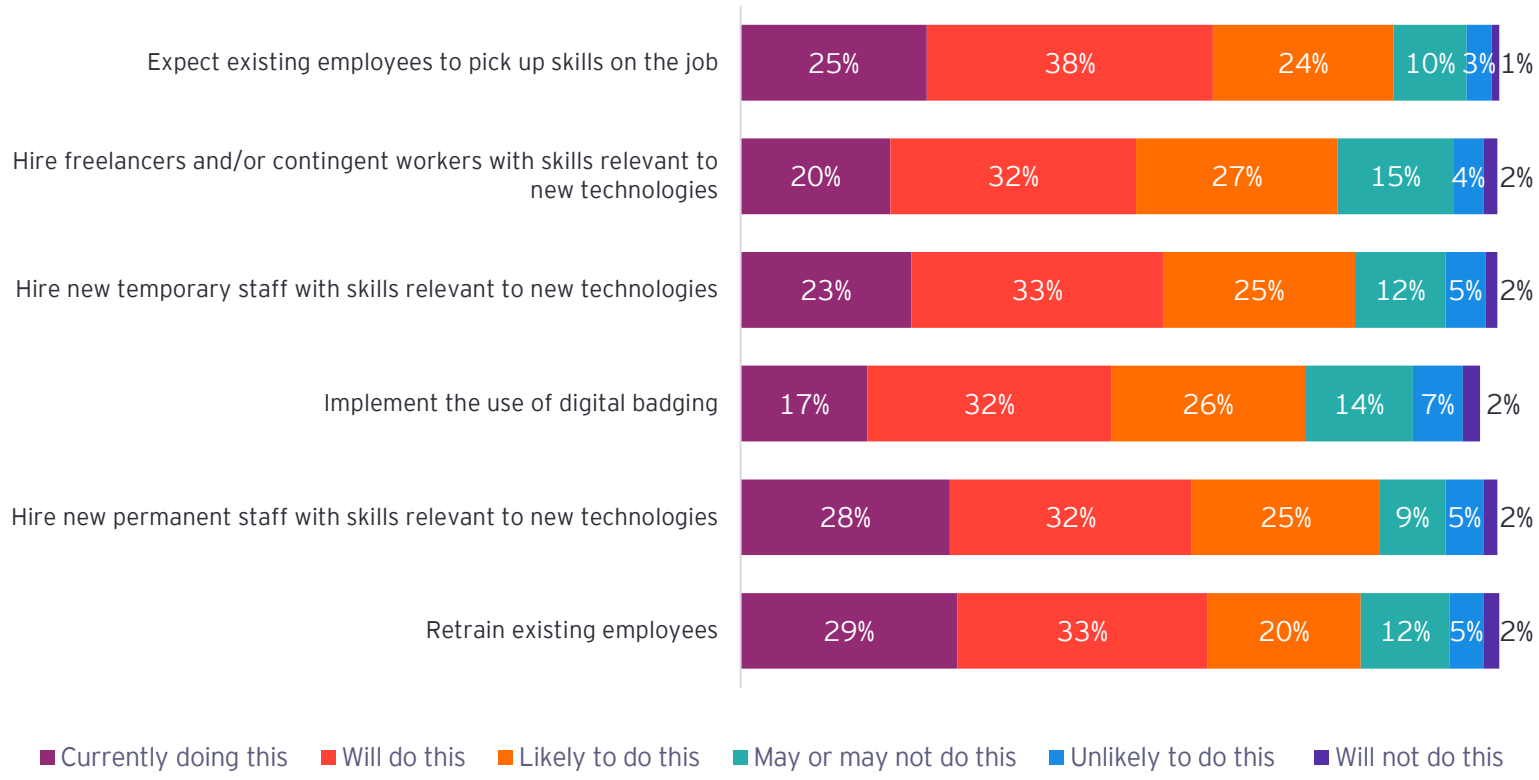
Nearly 85% of respondents believe that the ability to reskill the workforce will be crucial for success over the next five years. However, the data highlights significant inaction: 29% indicate they are currently retraining their existing employees, while 53% say they plan to do so but haven't yet started. Instead, nearly two-thirds expect their employees to acquire new skills on the job, either now or in the future.

This disjointed strategy creates silos and reflects a failure to connect to the intended business outcomes, leaving organizations ill-prepared to adapt to rapidly evolving technological demands.

Moreover, the absence of a comprehensive workforce strategy is likely a contributor to employee engagement and retention. A "go-it-alone" approach – expecting employees to use discretionary effort or just pick up skills as they work –contributes to value leakage and leads to employee disaffection and disengagement.

To effectively develop workforce skills, organizations must adopt a holistic approach directly connected to technology adoption plans and value objectives, measured as a key lever of success as investment decisions are made.

How will your organization address changing skills needs over the next five years?



Bridge the gap

Hiring and retaining critical, and in-demand technology skills

Companies across many sectors are actively recruiting talent outside of their industry with in-demand skills, which intensifies the competition for attracting and retaining these professionals. Further, the *EY Work Reimagined 2024 Survey* found energy employees are more likely to quit (52%) than other industries.

The chance to work with technology advancements can be an advantage to retention as 54% of those working in Oil & Gas and Chemicals say they chose their career because of the opportunity to work with advanced technology and be at the forefront of innovation.

However, retention and attraction efforts are complicated by the fact that 81% of respondents report a lack of dedicated personnel and 72% cite insufficient support from senior leadership to address worker retention. Combined with a go-it-alone skills approach, this creates the retention challenges reflected in the survey results.

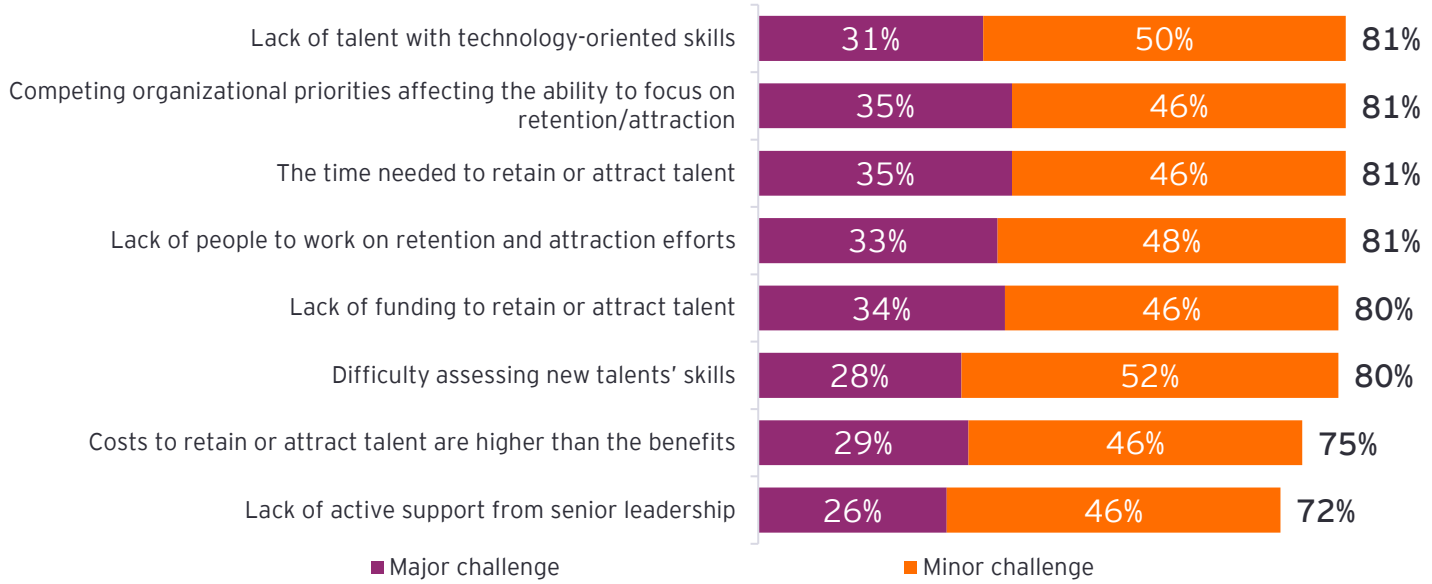
Overcoming these barriers will be crucial to enable the sourcing and retention of the talent that Oil & Gas and Chemicals companies need.

35%

▲ 24ppt from 2020

Experienced high-tech workers without industry-specific experience cannot learn what they need to know about the industry quickly enough to meet our needs

What challenges do you face related to worker retention or attraction?



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Reskill the base

Creating a clear vision with measurable outcomes

Our survey reveals many companies lack a cohesive reskilling and upskilling vision, leading to inefficiencies and missed opportunities for growth.

Alarmingly, nearly three in four executives view training as a cost center rather than an opportunity for improvement, which undermines the commitment to developing a skilled workforce. Further, 82% believe the costs of reskilling or upskilling talent often outweigh the benefits. It is not clear that the connection between unrealized value from tech investments is being made to skill development.

For leaders, it is essential to develop a clear vision with achievable outcomes and shift the mindset around workforce training. This will enable reskilling efforts to show measurable value. However, a mindset shift is not the only critical step. Resourcing retraining efforts is also a challenge that companies must address, due to the lack of time, funding, and teachers and trainers.

By addressing these challenges and prioritizing workforce development alongside technology investments, organizations can work to ensure they maximize the value of their technological advancements and drive sustainable growth.

The time needed to reskill and upskill talent is problematic. **82%**

82% The costs of reskilling and upskilling talent often outweighs the benefits.

The lack of people to serve as teachers and trainers are a challenge to reskill or upskill. **83%**

81% It is difficult to assess employees' progress in upskilling or reskilling.

Workforce mix

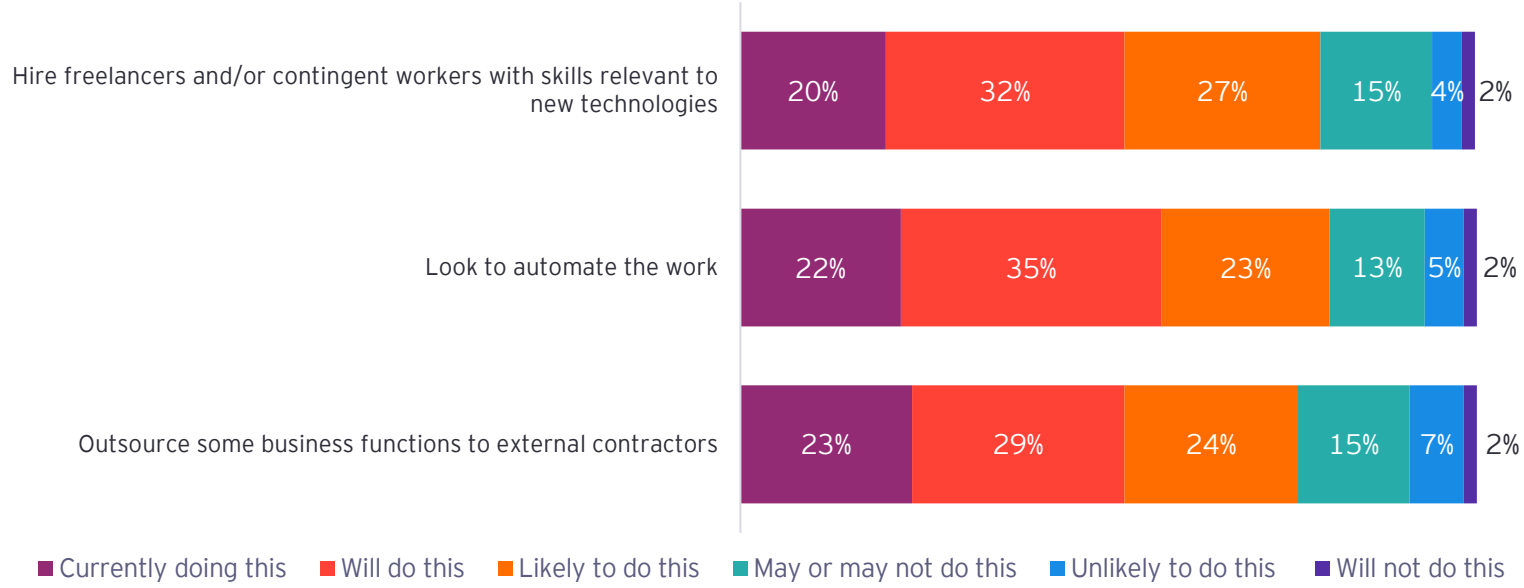
Taking a multichannel approach solves and creates challenges

While more than half of companies indicate they will recruit to meet skill needs in critical areas, one-third or more plan to rely on contractors and contingent workers. In fact, 81% of respondents agree they will need to depend on vendors and contractors more than they have in the past, reflecting a 24ppt increase since 2020.

These strategies allow organizations to rapidly access specialized skills and experience that may not be available internally, facilitating the implementation of new technologies and driving innovation in the short term. In the long term, over-reliance on a multichannel workforce can hinder an organization's ability to build and retain internal talent, ultimately jeopardizing its market differentiation.

To maintain a competitive edge, organizations must strike a balance between utilizing external talent and investing in the continuous development of their internal workforce, working to ensure that they cultivate a skilled and adaptable team capable of driving long-term success.

How will your organization address changing skill needs over the next five years?



81% Meeting our workforce needs will require us to rely more on vendors and contractors than in the past.

Secret sauce

Shifting the culture and mindset is necessary

To effectively bridge the gap between workforce and technology investments, companies must shift their mindsets.

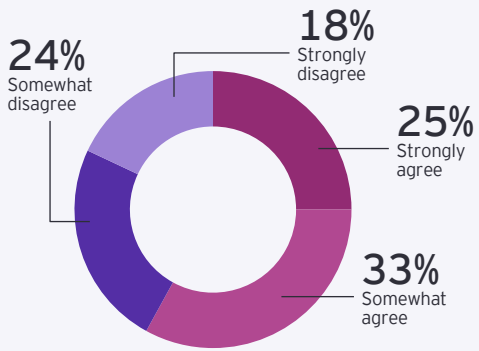
More than half of our survey respondents (58%) report their culture impedes the adoption of digital technologies, and 57% indicate that organizational structure complicates innovation efforts. Further, 81% point to competing organizational priorities as a significant challenge to reskilling or upskilling.

Leadership commitment is crucial in facilitating this cultural transformation. To overcome these challenges, leaders must articulate a clear vision that connects workforce development to the strategic goals of technology investments, demonstrating how upskilling can enhance operational performance and competitive advantage.

Rather than seeing skills as a static requirement, leaders must recognize them as dynamic assets, constantly changing and expanding to facilitate innovation. By fostering an environment where employees feel empowered to pursue new skills and knowledge, companies can unlock the full potential of their technology investments, helping to ensure they remain agile and responsive in a rapidly evolving industry landscape.

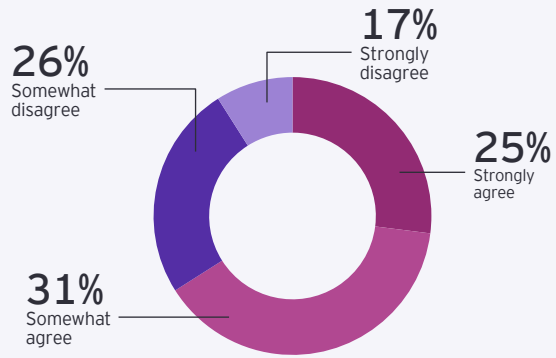
70% Lack of active support from senior leadership is a challenge to reskilling or upskilling.

Our organization's culture impedes the adoption of digital technologies



Total agree: 58%

Our organization's structure makes innovating more difficult



Total agree: 57%

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3 Maximum impact

Organize with a value-first lens

> As technology adoption speeds up, companies need to organize for value — with clear objectives, plans to scale and a workforce to execute.

Ben Williams

EY Americas Oil & Gas and Chemicals Consulting Leader

Planning based on impact

Organizing with a value-first lens in technology investment is crucial to maximize returns and drive sustainable growth, especially given that very few companies are currently achieving the expected value across a range of technologies.

By clearly specifying the achievable value of each technology use case and understanding how that use case can scale across the organization, companies can effectively close the gap between expectations and reality.

This approach not only prioritizes investments that align with strategic business objectives but also enables organizations to make informed decisions about where to allocate resources for maximum impact. Adopting this value-first mindset quickly is critical, as new advancements and products will continue to emerge at a rapid pace.

Companies must become smarter about identifying cost-to-value ratios and be more selective in their technology choices to help ensure that each investment contributes meaningfully to their operational goals.

By fostering a culture that emphasizes the importance of measurable outcomes and collaboration across departments, organizations can create an agile and responsive environment that enhances technology adoption at scale and strengthens their competitive position in the market.

Embrace a two-track model

Balancing core and innovation investment strategies

The rapid development of operational technologies is requiring companies to rethink how they invest in and implement new tools and systems. One approach that can help is embracing a two-track model for technology that distinctly separates core, foundational technology from fast-evolving innovation technology. Core technologies are major efficiency and stability platforms that are typically on a two-decade development cycle, such as ERP.

Thinking of the two tracks separately, and developing a unique investment strategy for both, is critical in today's landscape.

- Investments in foundational technology should focus on optimizing existing processes, working to ensure robust training programs are in place to equip the workforce with the necessary skills to effectively utilize these systems. This includes ongoing training and support to help employees adapt to updates and enhancements, helping to ensure that the platforms continue to deliver value and drive productivity.
- Investments in innovation technologies, such as AI, ML and advanced analytics, demand a more agile and exploratory approach. Companies should foster a culture of experimentation and continuous learning, encouraging employees to engage with these emerging technologies through hands-on projects and collaborative initiatives.

This two-track model allows companies to maintain operational excellence while simultaneously driving innovation, positioning them for short- and long-term success in a dynamic market.

> "Investment in our sector is not just in assets, but in technology and capabilities too. Deploying distinct strategies for foundational as well as emerging technology creates value today and tomorrow.

Swapnil Bhadauria

EY Americas Oil & Gas Digital Operations Leader

Align technology to talent

> The various phases of technology adoption demand a clear workforce strategy and a thoughtful approach to talent development, balancing continuous employee learning with a broader ecosystem approach.

Tim Haskell

EY Americas Oil & Gas and Chemicals People Consulting Leader

Strategizing to boost capacity

By aligning their technology investments with workforce investments, companies can drive tangible value across the organization. While companies are clearly developing skills and creating plans, there is still significant work to be done to formalize this workforce transformation and connect their efforts to capital allocation.

Further, the work will be ongoing as new technology will create new and different needs from the sector's workforce. That said, the effectiveness of new technologies heavily relies on the capabilities of the workforce using them. Key considerations include:

- By offering resources, mentorship and opportunities for cross-functional collaboration, organizations can empower employees to explore new ideas and applications of technology.
- While upskilling the workforce often requires technical training, it also means cultivating a mindset that embraces change and innovation.
- By prioritizing training and development alongside technology investments, companies can empower employees with the necessary skills to leverage advancements effectively.
- While attraction, retention and upskilling will fill some gaps, companies will also look to technology as well as third parties to support their skill needs.
- By constantly assessing how the adoption of technology is changing human-machine collaboration, companies can stay ahead of skills gaps and needs proactively.

Continued investments in technology enhancements will undoubtedly pay off in the years ahead, as companies sharpen their ability to plan and implement new tools while gaining a stronger understanding of the need for — and best approaches to — reskilling their workforces.

Foster an agile workforce

Building a competitive edge

Prioritizing continuous learning and adaptability within their organizational culture enables companies to create agility in their workforce. Further, improving collaboration to identify meaningful business needs, along with a renewed emphasis on training, can help close the skills gap and enable companies to drive greater value from their technology investments.

However, achieving this goal is complicated by the challenges many companies face. To overcome these obstacles, companies should consider a couple of critical levers:

- First, technology can support workforce agility by utilizing digital tools that facilitate communication, project management, and remote collaboration.
- Second, an environment that promotes ongoing training and development opportunities can result in employees who are better equipped to respond to rapid technological advancements and changing market conditions.
- Third, implementing platforms that enable real-time information sharing and feedback can help teams respond more quickly to challenges and opportunities as they arise.

By fostering an agile workforce that embraces change and innovation, while also addressing the structural challenges that hinder progress, companies can enhance their operational efficiency, drive sustainable growth, and maintain a competitive edge in an increasingly dynamic industry landscape.

> “Embracing technology advancements is essential for thriving in the digital age. These findings underscore the urgency for organizations to navigate transformation effectively with humans at the center, paving the way for the future.

Haniya Mian

EY Americas People Experience Solution Leader

Transform culture and create an unconstrained mindset

"

Driving immediate value and enabling long-term resilience requires a leadership-led culture shift that reinforces the criticality and connectivity of technology and the workforce to future success.

Pat Jelinek

EY Americas Oil & Gas and Chemicals Leader

Enabling value and lasting change

Leadership plays a pivotal role in transforming the organizational culture and mindset around technology and innovation. To initiate this evolution, leaders can consider the following actions:

- Articulate a clear vision that emphasizes the importance of embracing new technologies as essential tools for achieving strategic objectives.
- Foster an environment that encourages experimentation and risk-taking, leaders can empower employees to explore innovative solutions without the fear of failure.
- Promote and participate in training and development initiatives to prove the company's commitment to continuous learning and skill enhancement.
- Recognize and reward innovative thinking and collaboration to cultivate a culture that values adaptability and responsiveness to change.
- Create forums for open dialogue where employees can share their insights and experiences related to technology adoption and innovation.
- Foster a sense of ownership and accountability among the workforce by actively seeking feedback and involving employees in decision-making processes.

Sustaining this cultural transformation necessitates ongoing communication and engagement with employees at all levels.

By aligning technology investments with workforce development initiatives, leadership can reinforce the message that skills and innovation are integral to the company's success in an ever-evolving industry landscape.

4 Appendix

Who's included in our survey

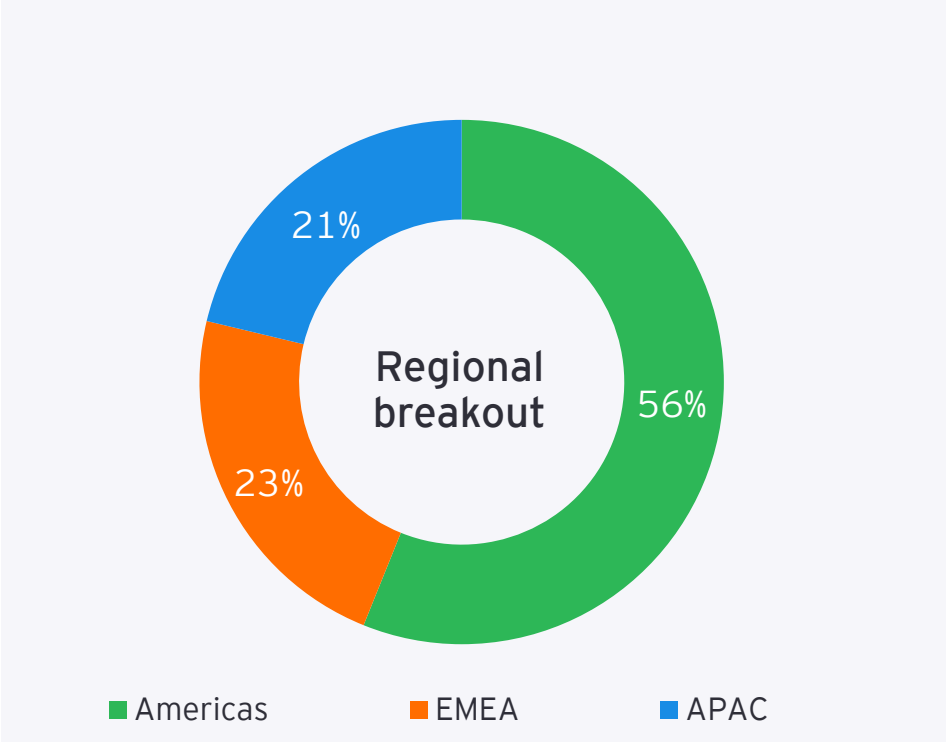
Methodology: TRUE Global Intelligence, the in-house research practice of FleishmanHillard, conducted an online survey of 508 global oil & gas and chemicals employees.

The survey was fielded from November 4 to December 3, 2024, with a median completion time of 15 minutes.

To qualify for the survey, respondents must work within their employer's strategy, operations, IT, digital or HR departments, or hold such a role in another department.

Employees at the non-manager/staff level were asked questions about their perceptions of the energy and oil & gas and chemicals industry, while employees at the Director level and above were asked about specific technologies, skills, and challenges at their organization. Throughout the report, respondents with manager titles or lower are referred to as "**Employees**" and director and above level respondents are referred to as "**Executives**."

This survey was fielded in the Americas, EMEA, and APAC regions, with the following sample breakout:



Americas	n=285
United States	n=179
Brazil	n=57
Canada	n=48
Other	n=1

EMEA	n=115
Germany	n=62
Saudi Arabia	n=17
United Kingdom	n=36

APAC	n=108
Indonesia	n=58
Malaysia	n=49
Other	n=1

Respondent profile

Country

US	35%
Canada	9%
Brazil	11%
UK	7%
Germany	12%
Saudi Arabia	3%
Indonesia	11%
Malaysia	10%
Other	<1%

Area of responsibility

Supply chain/logistics	33%
Information technology (IT)	33%
Operations	28%
Business strategy	24%
Digital technology	16%
Finance	15%
Human resources (HR)	13%
Transformation	10%
Other	1%

Decision-Making

Technology adoption	
I am the primary decision-maker	45%
I share decision-making	40%
I advise decision-makers	14%
None of these	1%
Digitization	
I am the primary decision-maker	46%
I share decision-making	35%
I advise decision-makers	17%
None of these	2%
Training and Recruitment	
I am the primary decision- maker	37%
I share decision-making	44%
I advise decision-makers	17%
None of these	2%

Job level

C-Level	30%
Vice president	19%
Director	29%
Manager	21%
Analyst/individual contributor	1%

Time in industry
Average number of years

Total	13.03
Employees	11.13
Executives	13.57

Respondent profile

Level of expertise

I am an expert in the oil & gas and chemicals industry	36%
I am an expert in my specific functional role or field	36%
I am an expert in both	28%

Markets organizations operate in

North America	51%
Europe	30%
Asia-Pacific	28%
Middle East	22%
Latin America	20%
Africa	7%
All of the above	4%

Employees in organization

Fewer than 1000	24%
1,000 to 4,999	34%
5,000 to 9,999	22%
10,000 to 24,999	12%
25,000 or above	9%

Type of organization

Upstream	37%
Midstream	27%
Integrated	15%
Downstream	12%
Oilfield services	8%
Something else	1%

Organizational revenue

Less than US $50 million USD	6%
US $50,000,000 to $99,999,999 billion	8%
US $100,000,000 to $499,999,999	15%
US $500,000,000 to $999,999,999	23%
US $1 billion to less than $2 billion	26%
US $2 billion or more	21%

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