

## Working As One Survey 2023

### Analysis of Results

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Prepared by

**Astrimar Ltd**

On behalf of

**OEUK**

**Commercial-in-Confidence**

**Astrimar Ltd**  
Cranfield Innovation Centre  
University Way  
Cranfield, Bedfordshire  
MK43 0BT  
UK

**OEUK**  
Annan House  
33-35 Palmerston Road  
Aberdeen  
AB11 5QP  
UK



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## EXECUTIVE SUMMARY

OEUK commissioned the Working As One collaboration survey to help companies understand how they work together in the industry. The survey, launched in July 2023, was made open to all OEUK members with the intention to measure the extent of cooperative business behaviours within the supply chain. The Working As One survey, managed by Astrimar, was designed to build upon the 2021 Working as One survey and other earlier collaboration surveys previously undertaken by Deloitte.

The Working as One survey was designed to also encourage suppliers to rate the cooperative behaviours of their clients.

The survey was structured around the 10 OEUK Supply Chain Principles with the intention of developing an understanding of the uptake of the principles adopted by industry. The intention is for this feedback from the survey to provide data for future industry publications aimed at driving continuous improvement in business collaboration and competitiveness.

A key objective of the survey was to gather as much feedback from as many people and organisations as possible, so to this end, the survey was distributed by providing ownership of individual survey links to individual Operator and Tier 1 companies, so they could then distribute this onto their own supply chains.

To maximise uptake of the survey, the duration of the survey was extended to the start of November 2023, enabling further operators and Tier 1 contractors to generate their own supply chain feedback.

26 purchasing companies (Operator or Tier 1 supply chain companies) based in the UK Continental Shelf (UKCS) registered to participate in the survey. In addition, a generic survey was created which would allow anyone to also respond independently. Of the 26 surveys, two companies received no response, leaving 24 company surveys. 1 company received only 3 responses so did not receive an individual report or a comparative ranking, however, the data from these responses have been included in the combined results this report.

During the time between July and November when the surveys were active, a total of 407 responses were received. The data and analysis of the results of this survey are presented in an aggregated form in this report, with all respondents and supply chain companies remaining anonymous. Individual company reports have been created for each of the 23 companies who received enough responses from their own company survey link. These individual reports have been shared directly to each associated company.

Key observations from the survey are summarised below with more detail provided in the body of the report.

Of the 24 surveys, 17 were created by Operators and 7 by Tier 1 suppliers. Of the 407 responses received, 61% were from Large Enterprises (i.e. with over 250 employees and a turnover of over £36mn) and 39% were from Small or Medium Enterprises (i.e. with fewer than 250 employees and a turnover of less than £36mn).

As well as results of the questions related to the 10 supply chain principles, feedback is also presented on the demography of the respondents and their perception on how well the Supply Chain Principles are understood and applied. The 2021 Working as One survey also asked questions about reasons for, and effectiveness of, collaboration and also on progress to date related to the Energy Transition. It was decided to omit these questions in this year's survey, in the interest of efficiency and focus.

90% of respondents either strongly agreed (45%) or agreed (45%) that supply chain principles are understood and widely applied within their organisation.

In line with the previous Working as One survey, Supply Chain Principle 3, relating to skills and competences, was the principle that scored most highly across all companies. Supply Chain Principle 7 related to alternative bidding, scored the least across the board, identifying this as the area for greatest improvement. Additional observations of trends are presented in the conclusions to this report.



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## 1. INTRODUCTION

OEUK commissioned the Working As One collaboration survey to help companies understand how they work together in the industry. The survey, launched in July 2023 was made open to all OEUK members with the intention to measure the extent of cooperative business behaviours within the supply chain. The Working As One survey, managed by Astrimar on behalf of OEUK, was designed to build upon the 2021 Working as One survey and other earlier collaboration surveys previously undertaken by Deloitte. The objective was to understand UKCS upstream supply chain collaboration. As with the 2021 survey, individual purchasing companies were able to generate surveys of their own which could be issued directly to their supply chain – meaning companies were able to obtain feedback from their suppliers, rating the cooperative behaviours of their peers, as well as their clients.

The survey was structured around the 10 OEUK Supply Chain Principles with the intention of developing an understanding of the uptake of the principles adopted by industry. These include agreement of a fair allocation of risk and costs, reasonable payment terms and prevention of contract cancellations, and use of industry collaboration tools were also explored.

The electronic survey was conducted using Microsoft Forms, with all responses anonymous – no personal data was stored or requested from respondents. Survey responses were aggregated across individual company surveys.

There were 26 individual surveys created by companies based in the UK Continental Shelf (UKCS) along with a generic survey which would allow anyone to also respond in the context of a selected company, if not requested directly to do so by that company. The surveys were active from 31 July to 1 November 2023, and they received a total of 407 responses.

This Working As One report presents the results from these surveys, anonymously, and aggregated within, and across organisations. Key observations from the survey are summarised within the report along with comparisons between organisations and organisation types. The intention is for this feedback from the survey to provide data for future industry publications aimed at driving continuous improvement in business collaboration and competitiveness.

The complete set of anonymised results were made available in PowerBI along with an interactive dashboard, allowing for the data to be visualised, filtered, and sliced.

### 1.1. OEUK's Supply Chain Principles

The names and brief descriptions of each of the 10 OEUK Supply Chain Principles are defined below.

#### Supply Chain Principle 1: Risk and Reward

Risks and costs should be borne appropriately, proportional to the work scope and the opportunity for good performance should benefit everyone.



#### Supply Chain Principle 2: Payment Performance

Contractual terms and conditions will seek to utilise industry standards including mutual payment terms. Buyers shall strive towards supporting the Government Prompt Payment Code and 30-day payment terms.



#### Supply Chain Principle 3: Competency & Skills

All parties should ensure they have the competence and skills to deliver the work being tendered.





**Supply Chain Principle 4: Contract Cancellations**

Contract cancellations should not be without good reason or cause. If buyers and suppliers must have the ability to terminate a contract, the circumstance or risk should be outlined, explained, and understood.



**Supply Chain Principle 5: Tendering & Auditing Requirements**

Purchasers shall endeavour to optimise their tendering and audit requirements to respect the supplier's time and resources.



**Supply Chain Principle 6: Innovation**

Tender processes and evaluation should be based on value added rather than unit rates and be flexible to evaluate alternative offers as part of the bidding process.



**Supply Chain Principle 7: Alternative Bids**

An alternate bid (either technical or commercial) which a buyer sees as a winning proposition should be selected for award on its merit.



**Supply Chain Principle 8: Low-ball Bidding**

Buyers and suppliers should discourage the practice of "low-ball" bidding which will lead to contracts being renegotiated early on.



**Supply Chain Principle 9: Labour Agreements**

Buyers should agree clear rate escalation mechanisms and move away from the practice of fixing labour rates for several years.



**Supply Chain Principle 10: Dispute Resolution**

Where a supplier (or potential supplier) feels unfairly treated, it should notify the buyer's CEO to ensure that speaking up is not held against it.







## 2. METHODOLOGY

### 2.1. Ranking approach based on survey sections

The survey consisted of 12 sections comprising of a section on demography, a section for each of the 10 supply chain principles, and a final comments/overall rating section. There was a total of 42 questions, as well as an opportunity to provide additional comments to each supply chain principle. All answers are anonymous. The results presented in this report are the aggregated responses from all 407 responses.

For the ranking of participating companies, 32 questions from the survey were selected in agreement with OEUK, across most of the sections, excluding Supply Chain Principle 9. Supply Chain Principle 9 was excluded as the question referenced the position of the respondents only, and therefore the responses are not reflective of the purchasing company (survey owner).

Only companies which received 7 or more responses to their individual surveys were included in the company rankings.

### 2.2. Selection of weightings and scores

All questions were equally weighted within each section such that the total score for each section was out of 10. Answers to questions were similarly scored with values between 0 and 10, where 10 was the most positive answer and in complete agreement or support of the question or statement, and 0 was the least positive possible answer.

An overall rank was calculated using the average of the scores for each of the included sections (i.e., Equally weighted). This meant that the overall rank was calculated on a scale between 0 and 10, where 10 was the most positive and 0 was the least positive.

Following previous survey sensitivity analyses, the scoring for “Don’t Know” answers were not included within the scoring as it was felt that a “Don’t Know” was not similar in implication to a “No” or “Never”. For example, when asked “Are you able to maximise full potential in adding value through innovation?”, it was felt that the answers of “No” and “Don’t know” were not equivalent. Therefore, “Don’t know” answers were excluded from the scoring.

Table 2.1 below shows how the scores were allocated for each possible answer for every question included in the overall ranking. This is based on initial discussion and agreement with OEUK.

**Table 2.1: Allocation of scores for each possible question response**

Section and Question	Answers and Score				
Supply Chain Principle 1	Risk & Reward				
Potential risks and rewards are objectively discussed and evaluated before contract start and shared fairly.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
Risk and reward is formally reviewed with the customer during the contract life cycle.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
My organisation has been able to amend commercial contracts with this customer to rebalance risk and reward.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0



Supply Chain Principle 2	Payment Performance					
The accounts payable (AP) process is clearly explained on contract award	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
The process for invoice dispute resolution is clearly explained on contract award	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
Reasons for invoice rejection are clearly explained	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
My organisation is able to make an adequate return on investment	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)	
	10	7	5	3	0	
What are the standard payment terms?	30 days or less	31-45	46-60	61-75	76 days +	
	10	7	5	3	0	
What percentage of correctly submitted invoices are paid on time as per the contractual terms and conditions?	95-100%	80-94%	65-79%	50-64%	25-49%	0-24%
	10	7	5	3	0	0
Which type of contract is the main basis for your commercial relationship?	LOGIC standard contracts		Other standard/model contract		Bespoke/Client Terms	
	10		10		3	
Supply Chain Principle 3	Competency & Skills					
Are the competency and skills required for the work clearly defined in a Scope of Work?	Yes	No				
	10	0				
Does the customer require you to demonstrate or provide evidence of the competency and skills of those undertaking the work?	Yes	No				
	10	0				
Supply Chain Principle 4	Contract Cancellations					
Have you had a contract cancelled or terminated early by the customer?	Yes	No				
	0	10				
If so, were the circumstances or risks outlined, explained and fair process followed?*	Yes	No				
	10	0				
Do you regularly receive customer activity forecasts and forward work plans?	Yes	No				
	10	0				
How reliable are the customers forward work plans?	95-100%	80-94%	65-79%	50-64%	25-49%	0-24%
	10	7	5	3	0	0



Supply Chain Principle 5	Tendering & Auditing Requirements				
There are opportunities to engage with the customer at the pre-tender stage, to help inform what is being tendered for	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
The tender process is efficient.	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
Does the customer conduct repetitive tendering for the same or similar scopes of work?	Yes	No			
	0	10			
Does the customer request information that is already available in pre-qualification systems or which has been provided previously through another means?	Yes	No			
	0	10			
Are the audit requirements suitable and efficient?	Yes	No			
	10	0			
Supply Chain Principle 6	Innovation				
We are invited or given the opportunity to provide new ideas or alternative bids as part of the tendering process	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
We are engaged with the customer to discuss work scopes outside of the tender process to encourage innovative approaches	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
We receive constructive feedback on the outcome of our bids	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
Are you able to maximise full potential in adding value through innovation?	Yes	No	Don't Know		
	10	0	Not Scored		
Supply Chain Principle 7	Alternative Bids				
Do tender processes allow for the submission of alternative proposals to be considered?	Yes, all the time (100%)	Yes, most the time (>66%)	Sometimes (33-66%)	Rarely (<33%)	Never (0%)
	10	7	5	3	0
Do you ever get asked to price against alternative solutions which were shared by another bidder?	Yes	No			
	0	10			
In the last 12 months have any alternative bids/proposals submitted by you to this customer been successful?	Yes	No			
	10	0			



Supply Chain Principle 8		Low-ball Bidding			
Have you been encouraged by the customer to submit pricing or rates which are unsustainable? i.e., low-ball bidding	Yes	No			
	0	10			
Has a contract required renegotiating due to unsustainable pricing?	Yes	No			
	0	10			
Supply Chain Principle 9		Labour Agreements			
Intentionally not included					
Supply Chain Principle 10		Dispute Resolution			
Do you ever need to escalate disputes to managing director or senior management level for effective resolution?	Yes	No			
	0	10			
Concluding Question					
How would you rate your overall relationship with your customer?	5	4	3	2	1
	10	7	5	3	0

### 2.3. Free text responses

All section included free text questions, enabling respondents to provide additional comments and feedback. Due to the volume and sensitivity of some of these responses, these are not included in full within this report, instead they are summarised for each section within the discussion section.

A Python script was used to analyse the raw comment responses, and to then produce a word cloud. In order to filter the results, all company names were removed from the comment data, minimum word length for inclusion was set at 4 letters, and only the 50 most prevalent words were displayed.

### 2.4. Grouping of ranked companies

Companies that received more than 7 survey responses were scored and ranked against one another to provide an overall table of ranking.

It was also suggested by OEUK, that there may be benefit in grouping Operators with respect to their relative approximated production activity within the UKCS over the 2022/2023 period. This enabled the results to account for and reflect an anticipated relationship between activity levels and the level of interaction with the supply chain.

Participating Operators were grouped into 3 categories, namely Group A, B and C. Group A included operators with a UKCS total production level greater than 20 mmboe, Group B includes operators with a UKCS total production level between 10-20 mmboe and Group C includes operators with a UKCS total production level less than 10 mmboe.

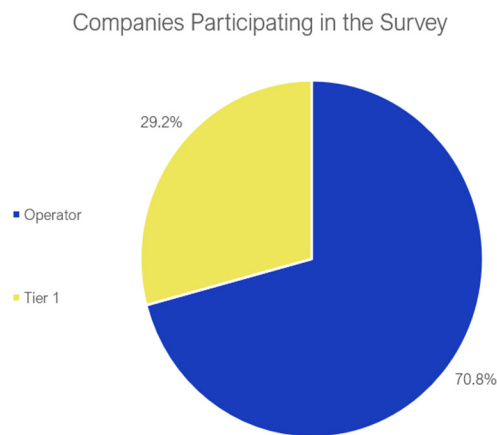
There are 5 Operators included in Groups A and B, while Group C contains 7 Operators. Other potential boundaries related to UKCS activity levels were considered, including categorisation into a greater number of groups containing fewer Operators, however it was agreed that the above was a fair and representative approach to take with the responses and comparison between them being reasonably well aligned.

There were 7 Tier 1 companies grouped together into Group D (one received less than 7 responses), no other factors were identified as part of this grouping.



### 3. DEMOGRAPHY

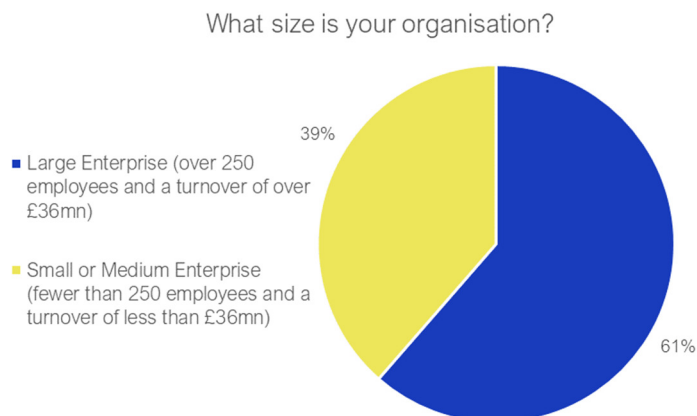
There were 24 surveys created by companies in the UKCS. Of the 24, 17 were created by Operators, and 7 by Tier 1 suppliers. See Figure 3.1.



**Figure 3.1: Analysis of respondents owning a survey link.**

Participating companies were encouraged to send the survey not only to their supply chain, but also to their own staff working within the procurement department.

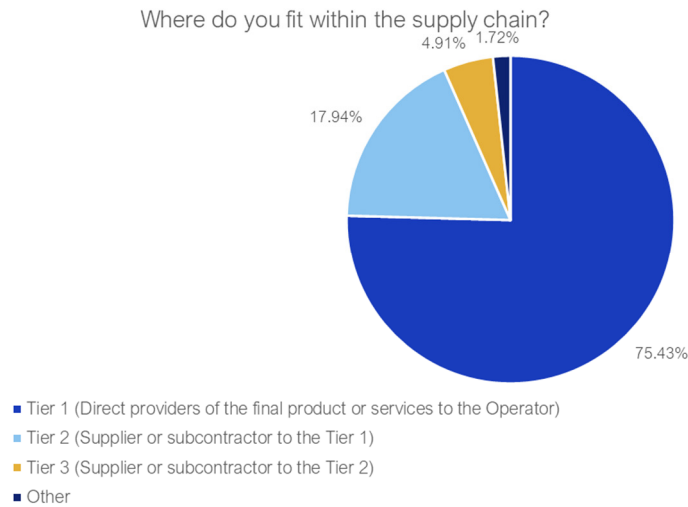
These surveys received 407 responses in total. Respondents were asked to state if they were with a Large enterprise or a Small or Medium enterprise. These responses are presented in Figure 3.2.



**Figure 3.2: Analysis of respondent organisation type**

Additionally, the respondents were asked to identify where their organisation fits within the supply chain. Of the responses, 75.4% selected Tier 1s, 17.9% Tier 2s and 4.9% Tier 3 suppliers. 1.7% of the respondents selected “Other” as shown in Figure 3.3. Of those who selected “Other”, they then defined themselves with the following range of definitions:

- Operator
- Manufacturer and/or Distributer
- Small SME - our main client is the operators
- Professional Services at differing levels
- We supply Medical Services to all of the above
- Travel provider

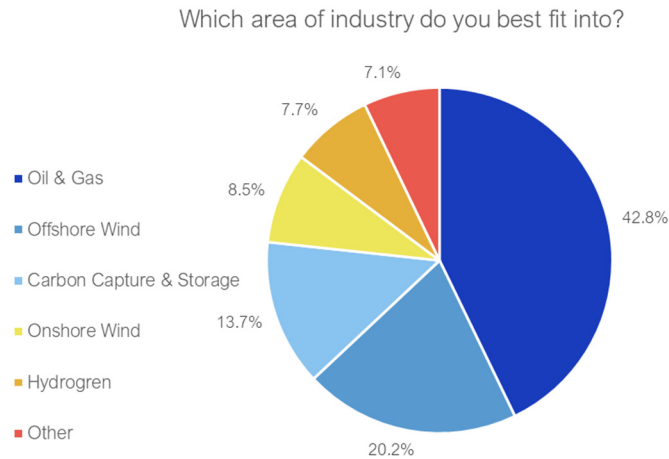


**Figure 3.3: Analysis of respondent organisation type**

Respondents were further asked to define the main areas of industry that their company fitted into. Respondents were able to select multiple answers if they fitted into many areas.

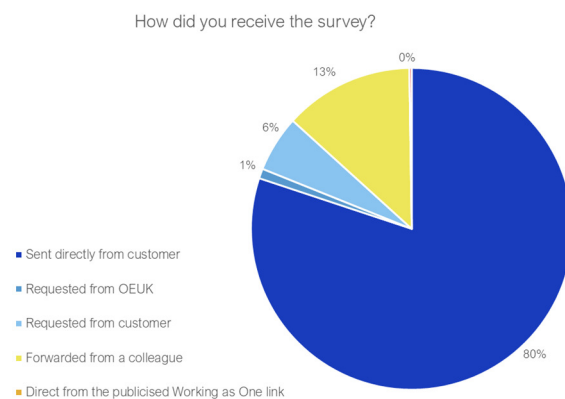
Figure 3.4 shows that the majority (42.8%) responded that they were in Oil & Gas, followed by Offshore Wind at 20.2%, Carbon Capture and Storage at 13.7%, and Onshore Wind and Hydrogen with 8.5% and 7.7% respectively. 7.1% responded with other industry sectors and these included:

- Aerospace
- Construction
- Energy from waste
- Food & Drink
- Infrastructure
- Life Sciences
- Minerals & Mining (including lithium extraction)
- Utilities (including Water and Wastewater)
- Automation
- Defence / MOD
- Environment
- Geothermal
- IT / IT Security
- Maritime
- Nuclear
- Petrochemicals
- Ports and harbours
- Safety services / Occupational Health
- Pharmaceuticals
- Training
- Stationery
- Travel Management



**Figure 3.4: Analysis of respondent industry sectors**

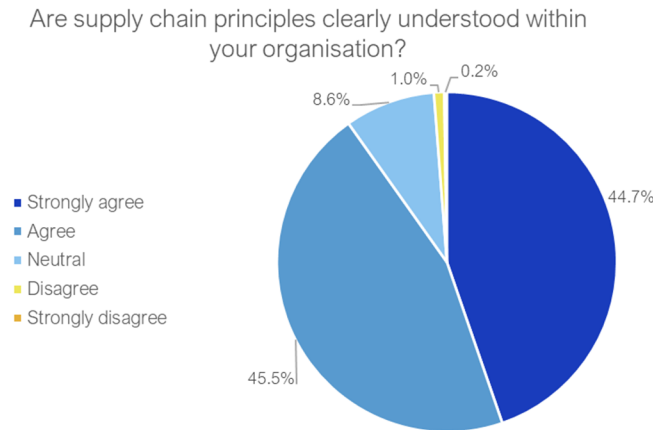
Respondents were asked where they received the survey from. With purchasing companies able to create their own individual surveys and invite their supply chains to participate, it was encouraging to see that 80% of respondents said they were asked by their customer to complete the survey. A further 13% said they were forwarded the survey link from a colleague as shown in Figure 3.5. Only 6% had to request a survey link from their partner, and 1% requested a link from the OEUK, with the remaining 0.2% of responses coming from other sources such as newsletters, social media, other industry bodies (such as SEQual) or elsewhere.



**Figure 3.5: Analysis of how respondents received the survey.**

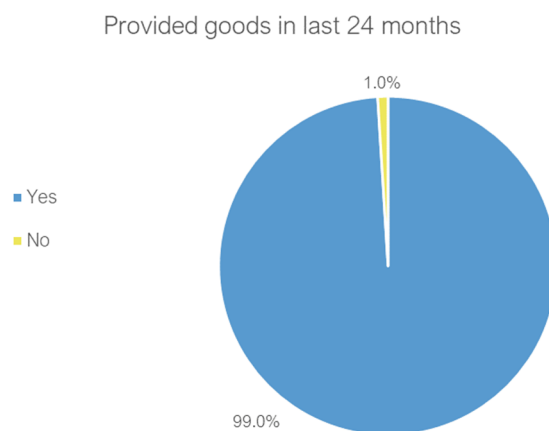


Respondents were asked if they believed that the Supply Chain Principles are understood and widely applied within their organisation. 90% of respondents either strongly agreed (45%) or agreed (45%), while 9% were neutral and only 1% disagreed, as shown in Figure 3.6.



**Figure 3.6: Analysis of Supply Chain Principle understanding and application.**

Lastly in this section respondents were asked if they had provided goods or services to the customer within the previous 24 months. 99% of respondents confirmed that they had, as shown in Figure 3.7.



**Figure 3.7: Analysis of the number of respondents who had provided goods and services to the customer.**





## 4. PRESENTATION AND DISCUSSION OF RESULTS

### 4.1. Overall Average Results

This section presents the detailed results for each Supply Chain Principle. Those Principles included in the overall ranking were scored, according to the methodology described in Section 2. Average scores for each Supply Chain Principle were calculated for each of the respondent groups (A to D). The score achieved for each ranked section per company group is shown in Figure 4.2 and tabulated in Table 4.1 below. For comparison, the average score is also shown across all sections and companies. For comparison the average scores by group category and overall average from the 2021 survey results are presented in Table 5.1 in APPENDIX 1.

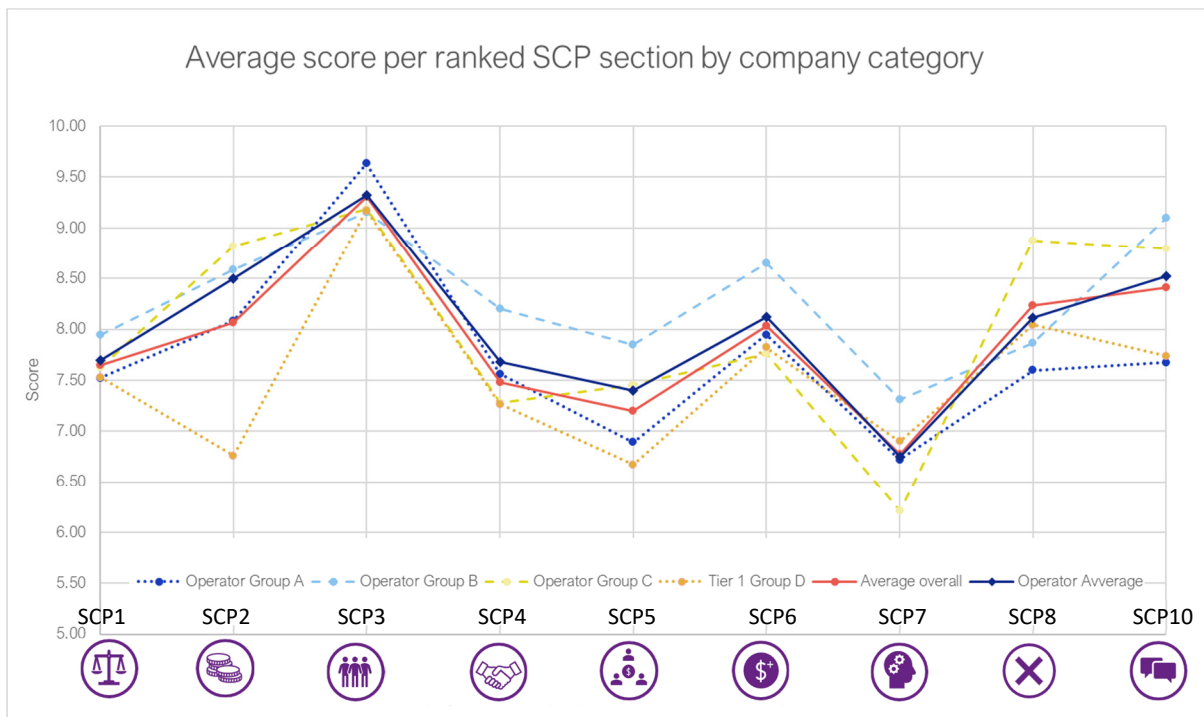


Figure 4.2: Average scores for ranked Supply Chain Principles, averaged by Company Group

Table 4.1: Average scores for ranked section by Group

Groups	Supply Chain Principle 1	Supply Chain Principle 2	Supply Chain Principle 3	Supply Chain Principle 4	Supply Chain Principle 5	Supply Chain Principle 6	Supply Chain Principle 7	Supply Chain Principle 8	Supply Chain Principle 10	Average
A	7.52	8.08	9.63	7.56	6.89	7.94	6.72	7.60	7.67	7.74
B	7.94	8.59	9.16	8.20	7.85	8.65	7.31	7.87	9.10	8.30
C	7.63	8.82	9.19	7.28	7.45	7.76	6.22	8.87	8.80	8.00
D	7.53	6.76	9.17	7.26	6.67	7.82	6.90	8.04	7.74	7.54
Average across all operator groups	7.70	8.50	9.33	7.68	7.40	8.12	6.75	8.11	8.52	8.01
Overall Average	7.65	8.06	9.30	7.48	7.20	8.03	6.77	8.24	8.41	7.90



These results clearly show the supply chain areas where all groups are strong and those areas where they are all weaker. The graph also enables comparison across the groups to see where there is difference in performance between the different operator groups as well as the differences between the operator and tier 1 groups. Supply Chain Principle 3, relating to skills and competences was the principle that scored most highly across all companies (this was also the best performing Supply Chain Principle in the 2021 Working as One Survey). Supply Chain Principle 7 related to alternative bidding scored the least across the board, identifying this as the area for greatest improvement, and was the lowest scoring principle in 2021. Supply Chain Principle 2 relating to payment performance and Supply Chain Principle 10 relating to dispute resolution had the greatest variation in average scores for each group, with operator group C performing best and tier 1 group D performing on average worst for Supply Chain Principle 2. Meanwhile operator group B performed best on average in Supply Chain Principle 10, with operator group A performing on average 1.5 points lower.

The combined average across all operators shows that they are on average above the tier 1 Group D for Supply Chain Principle 2 (payment performance), Supply Chain Principle 4 (contract cancellations) and Supply Chain Principle 5 (tendering and auditing requirements). Meanwhile the average scores for tier 1 group D are above the average of the operator scores for Supply Chain Principle 7 (alternative bids) and Supply Chain Principle 8 (low-ball bidding). The average of both groups are very similar for Supply Chain Principle 1 (risk and reward), Supply Chain Principle 3 (competency and skills), Supply Chain Principle 6 (innovation) and Supply Chain Principle 10 (dispute resolution).

#### 4.2. Introduction to Individual Supply Chain Principle Results

Throughout the following sections, the results for each Supply Chain Principle are discussed. All charts in the following sections share a colour scheme to aid in results communication. Below is the colour-blind friendly colour scheme used. More positive results or responses were coloured towards the left hand/blue side, with less positive results or responses coloured as orange or red.





### 4.3. Supply Chain Principle 1 – Risk and Reward

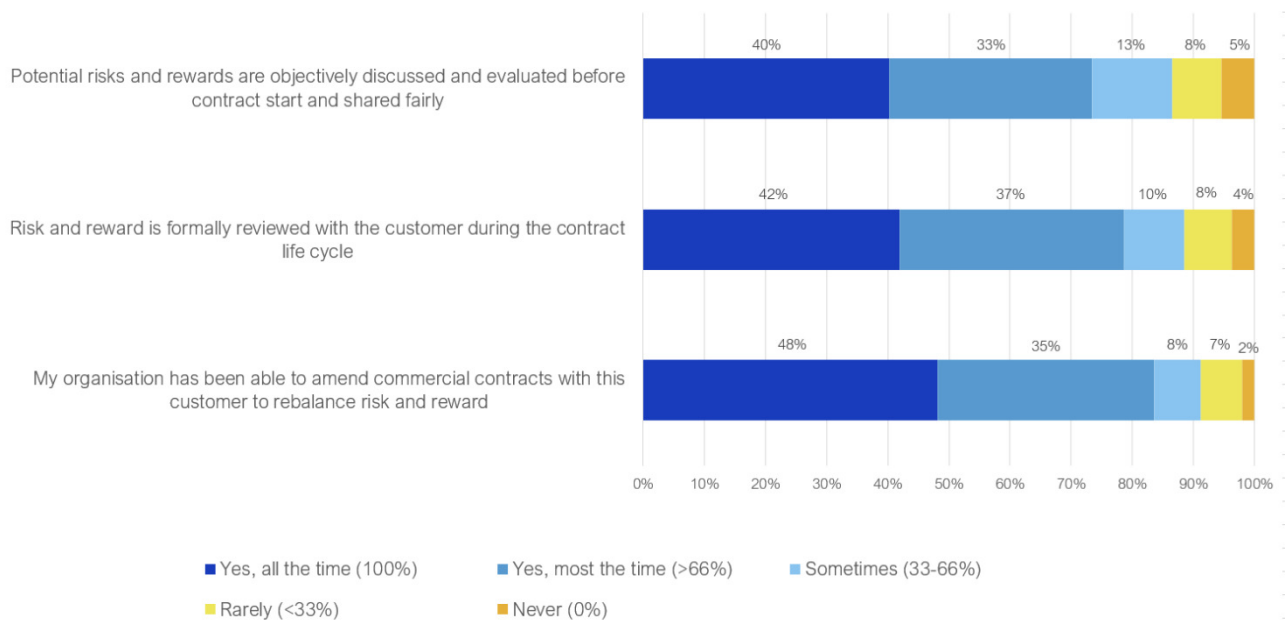


The majority of respondents indicated that *their organisation has been able to amend commercial contracts to rebalance risk and reward*, with 40% of respondents saying this happens all the time, and 33% saying it happens most of the time.

Further to this, 78% said *Risk and reward is formally reviewed with the customer during the contract life cycle*. 42% of respondents said this happens all the time, while 36% said it happens most of the time.

48% said that *potential risks and rewards were objectively discussed and evaluated before contract start and are shared fairly* all the time, with 35% saying it happens most of the time.

These results are presented in Figure 4.3 below.



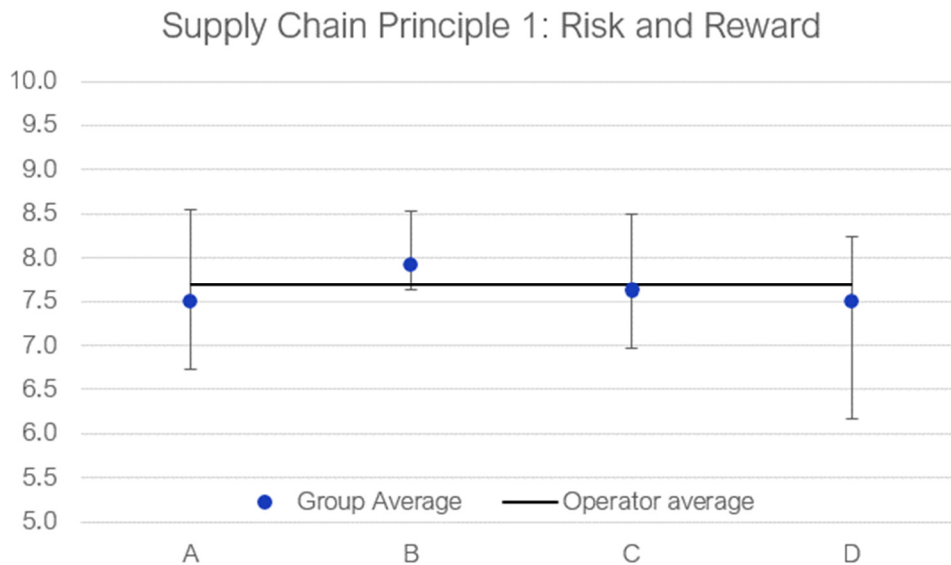
**Figure 4.3: Collated Responses to Supply Chain Principle 1 Questions on Risk & Reward**

Across all questions, most responses were in alignment with Supply Chain Principle 1. Comparing the ranking across all Supply Chain Principles, the average score (7.65) measuring adherence to this Principle was very slightly below average across all principles (7.90). The average score across all operator groups was slightly above the average across all groups at 7.70.

Figure 4.4 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 1. This shows that the mean scores for Operator Group B outperformed Operator Groups A and C and Tier 1 Group D. Performance within the first supply chain principle was somewhat consistent, with Groups A, B and C all scoring similar for the best companies in each category.



Operator Group A and Tier 1 Group D have a wider spread of scores than groups B and C, with the worst minimum score in Tier 1 Group D. Group B scored highest with the highest average score (7.94) as well as a much more consistent variation. The average scores for all groups are very similar to the average group scores in the 2021 Working as One survey. Overall, Tier 1's slightly below Operators with the lowest single score and an average on the low end compared to the other groups.



**Figure 4.4: Company Group Average Scores for SCP1: Risk & Reward**

#### 4.3.1. Free Text Responses

The sentiment of the free text responses somewhat matched the results of the previous questions. In total there were 62 text responses from the 407 total respondents. Responses appeared to be split between positive and negative, with no prevailing narrative towards risk and reward. Many of the comments suggested that risk was being pushed onto the supply chain for little reward. Others suggested that risk and reward has seen a good amount of consideration and collaboration between suppliers and operators. There is perhaps a 50/50 split between these viewpoints, however this is a marked improvement from the previous 2021 survey.



Figure 4.5 is a word cloud illustrating the key themes of the free text responses.



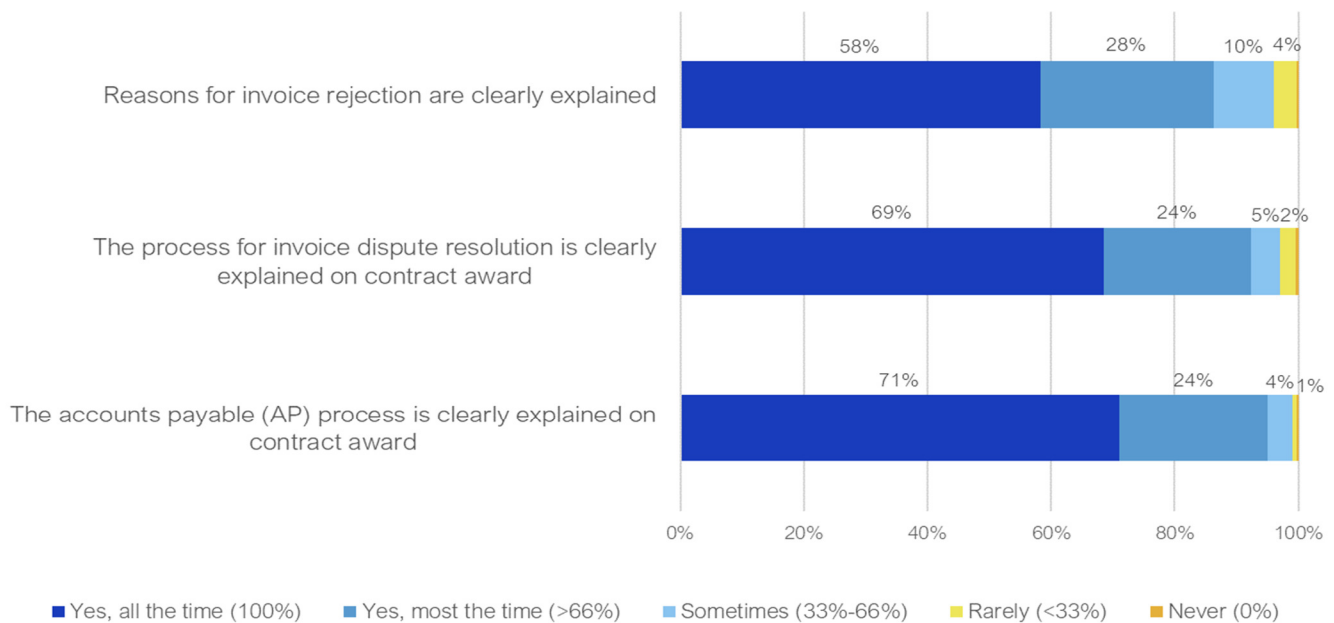
**Figure 4.5: Word cloud of key phrases in the free text responses to SCP1: Risk & Reward**



#### 4.4. Supply Chain Principle 2 – Payment Performance



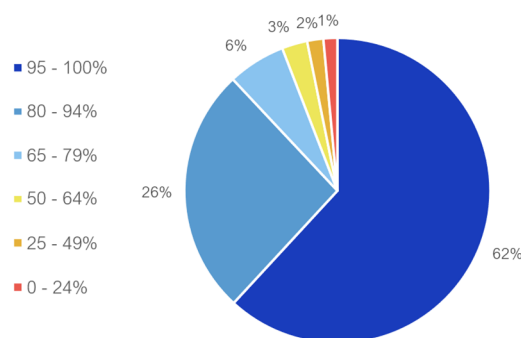
Figure 4.6 shows that *reasons for invoice rejection* were clearly explained, all or most of the time, for 86% of respondents, with 14% saying it was sometimes or rarely explained. Most respondents (93%) agreed that the *process for invoice dispute* was clearly explained on contract award all or most of the time, 5% said it was explained sometimes, and 2% said it was rarely explained. 71% of respondents agreed that the *accounts payable process is always explained before contract award*, with a further 24% saying it is explained most of the time.



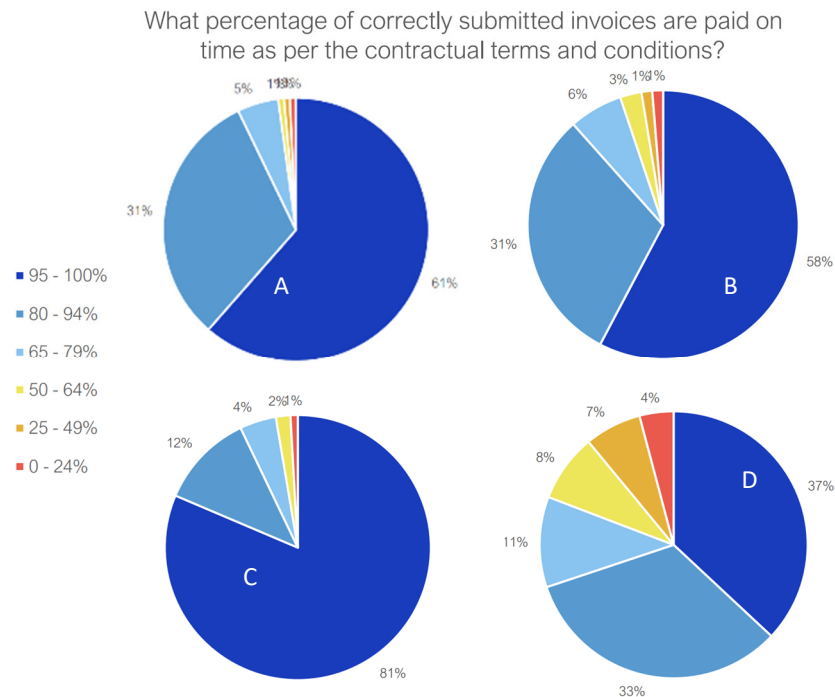
**Figure 4.6: Collated Responses to Supply Chain Principle 2 Questions on Payment Performance**

In terms of correctly submitted invoices being paid on time, Figure 4.7 shows that 62% indicated that invoices were paid on time 95-100% of the time. 26% said they are paid on time between 80-94% of the time, 6% of respondents said invoices were paid on time 65-79% and 6% said invoices were paid on time less than 50% of the time.

What percentage of correctly submitted invoices are paid on time as per the contractual terms and conditions?



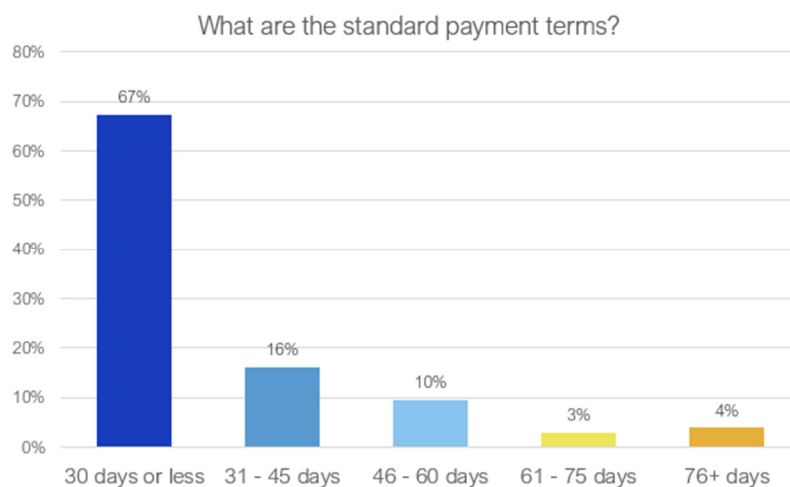
**Figure 4.7: Percentage of correctly submitted invoices paid on time**



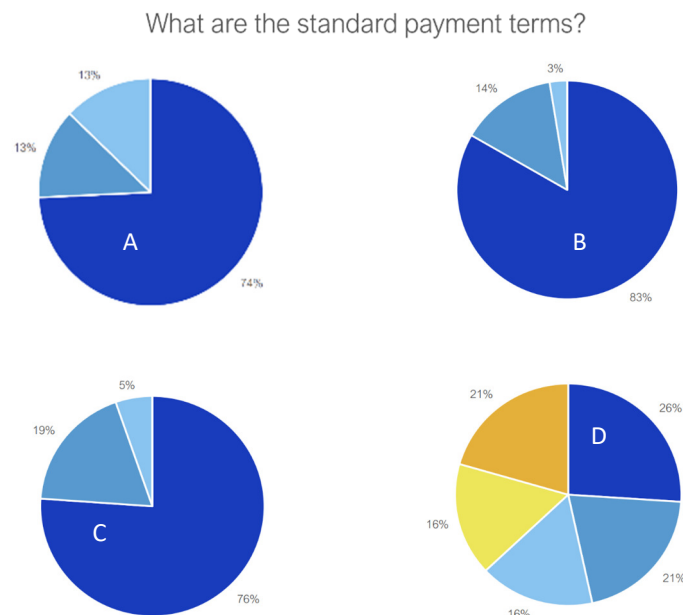
**Figure 4.8: Comparison of company groups responses relating to payment on time.**

Significant differences were noticed between the Operator groups and the Tier 1 group. As shown in Figure 4.8, Group D companies paid invoices on time significantly less than the Operators. Only 37% of responses said that Tier 1 companies pay on time 95-100% of the time, and 11% said they paid on time less than 50% of the time.

The results relating to the length of *standard payment terms* are presented in Figure 4.9. This shows that payment terms were typically 30 days or less for 67% of respondents, and between 31 and 45 days for 16% of respondents. 10% reported payment terms between 46 and 60 days, 3% between 61-75 days and 4% exceeding 76 days.



**Figure 4.9: Length of standard payment terms**

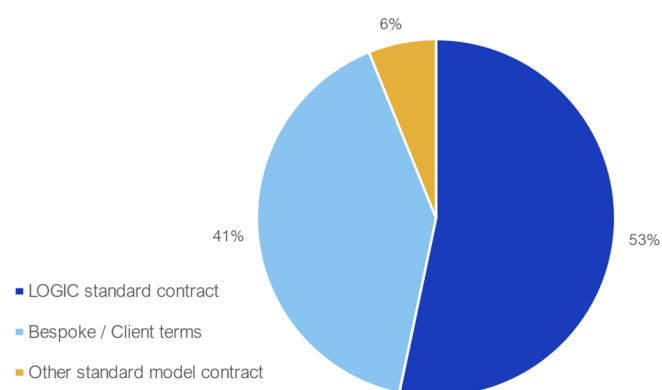


**Figure 4.10: Comparison of company groups responses relating to standard payment terms**

Figure 4.10 shows Group D performing very differently from the Operator groups. No operators are recorded as having standard payment terms of longer than 60 days, with the vast majority being 30 days or less. Whereas 16% of Tier 1 responses indicated at payment terms of 61-75 days, and 21% at longer than 76 days.

Figure 4.11 shows that for most respondents (53%) *LOGIC (Leading Offshore Energy Industry Competitiveness) standard contracts* are the basis of their commercial relationships with their customer, with 41% indicating that it is bespoke/client terms-based contracts that are used, and 6% that other standard contract models are used.

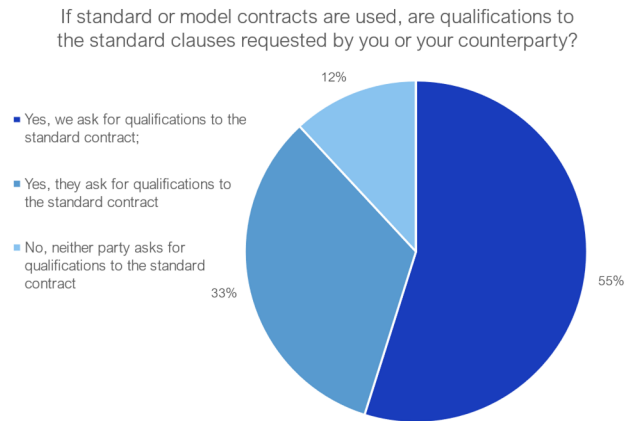
Which type of contract is the main basis for your commercial relationship?



**Figure 4.11: Type of contract used as main basis of relationship**

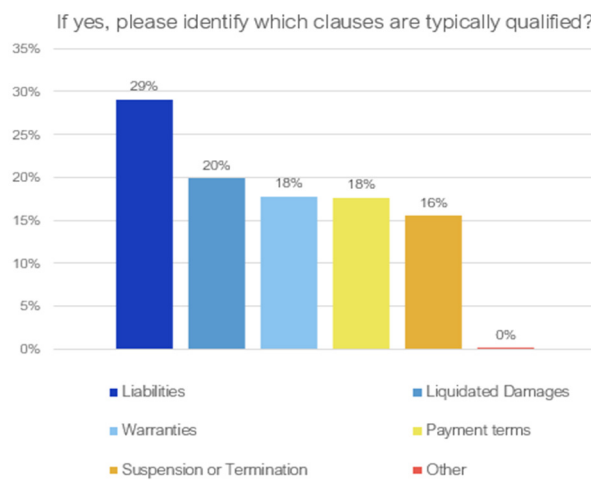
For 88% of respondents, these *contracts require qualification / modifications*. 55% of the time this is initiated by the supplier and 33% of the time by the counterparty. 12% responded that neither party will ask for modifications to the standard contract. See Figure 4.12.





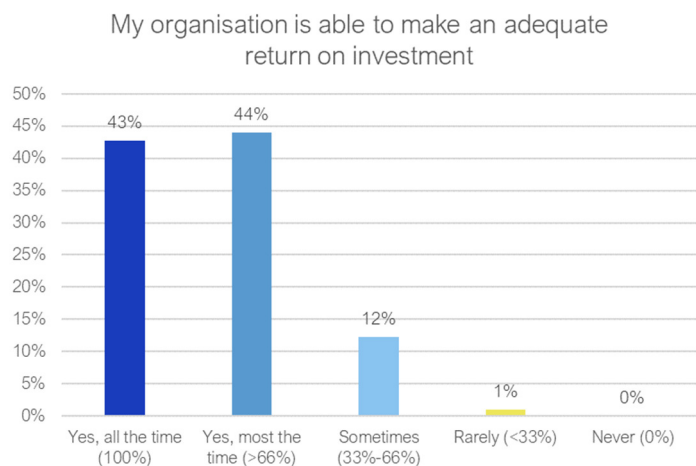
**Figure 4.12: Qualifications clauses included in contract**

Of the qualified clauses, shows that 29% of the qualifications were liability related, 20% related to liquidated damages. Warranties and payment terms were both 17%, and suspension / termination was 15%.



**Figure 4.13: Types of clauses qualified**

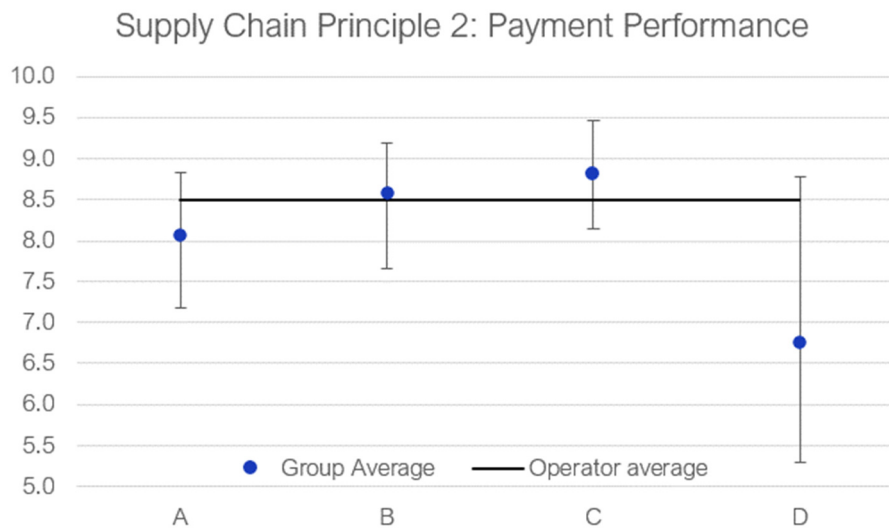
When asked how often respondents are able to make an adequate return on investment, 43% indicated that they were able all the time. 44% said most of the time, 12% said sometimes and 1% rarely. These results are shown in Figure 4.14.



**Figure 4.14: How often is adequate return on investment**



Payment performance saw a larger variance between groups than supply chain principle 1. Figure 4.15 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 2. Group C scored the highest on average (8.82) and individual maximum (9.48) scores. Group D performed significantly worse than the others, with by far the lowest average (6.76), more than a full point below the rest. The reasons for this is due to scoring significantly lower on standard payment terms and paying invoices on time. The overall average score for this supply chain principle was 8.06, which is above the average across all supply chain principles at 7.90. The average score across all operator groups was above the average across all groups at 8.50.



**Figure 4.15: Company Group average scores for SCP2: Payment Performance**

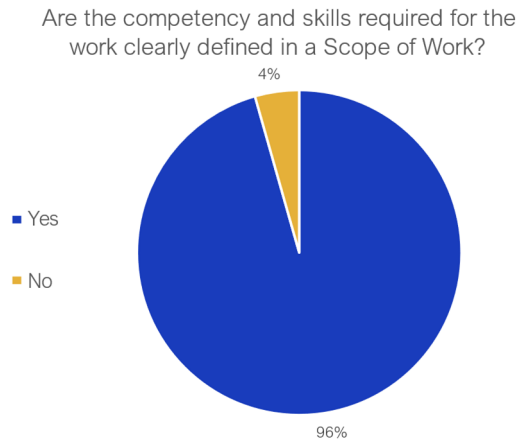




#### 4.5. Supply Chain Principle 3 – Competency & Skills

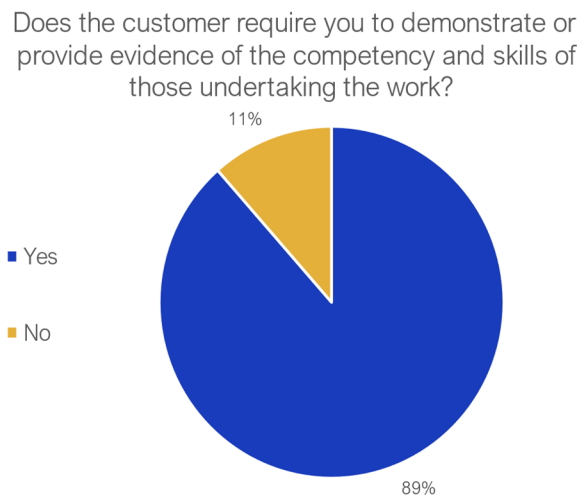


Figure 4.17 highlights that the vast majority of respondents (96%) said that *the competencies and skills required for the work are clearly defined in a scope of work.*



**Figure 4.17: Competency and required skills are clearly defined**

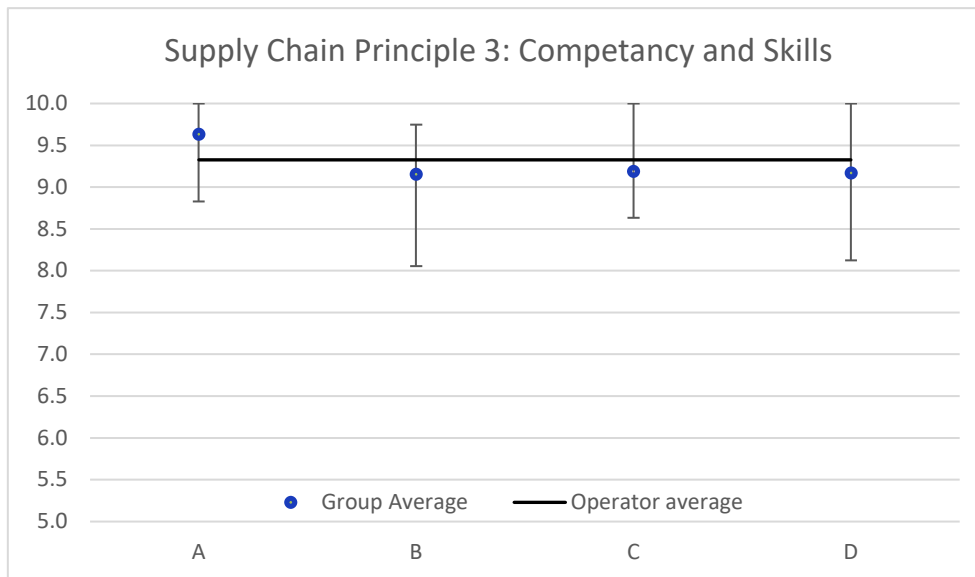
In 89% of cases, the respondents said that the *customer required demonstration or evidence of the competency and skills before work, as shown in Figure 4.18.*



**Figure 4.18: Required to demonstrate or provide evidence of competency and skills**



Figure 4.19 presents the mean, minimum and maximum scores achieved with each of the company categories for Supply Chain Principle 3 relating to competency and skills. The scores were high across all company groups, and it was the highest scored section for every group, with an overall average of 9.30. No significant outliers were present for this section, with every company scoring above an 8 (Gold Award), and every group averaging above 9. Group A scored the highest average (9.63), and Group B, C and D were very closely scored averaging from 9.16 to 9.19. This indicates that participating companies are typically clear in the competency and skills they require, as well as requiring evidence of those competencies. In this section Tier 1's performed on a par with the Operators, scoring similarly to groups B and C, as well as max and min scores within the range of Operator scores.



**Figure 4.19: Company Group average scores for SCP3: Competency & Skills**

#### 4.5.1.1. Free Text Responses

36 free text responses were received for this section. The vast majority were of positive sentiment, suggesting that competencies are demonstrated and assessed regularly.

The word cloud in Figure 4.20 below contains key phrases from the free text responses.



**Figure 4.20: Word cloud from free text responses to SCP3: Competency & Skills**

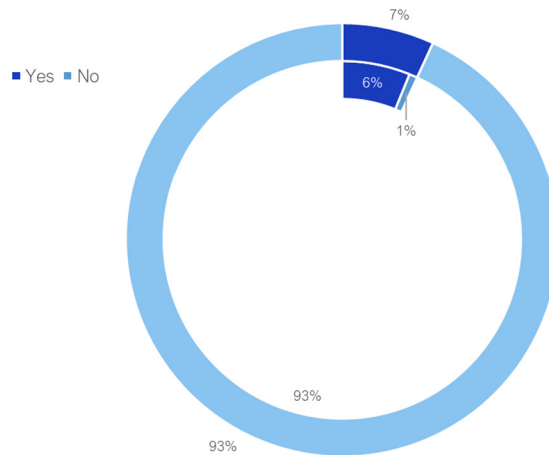


#### 4.6. Supply Chain Principle 4 – Contract Cancellations



Figure 4.21 shows that for Supply Chain Principle 4, only 7% of respondents have had a contract either cancelled or terminated early by the customer, with the vast majority (93%) saying that it hadn't happened to them. In the situations when a contract was terminated or cancelled - the circumstances or risks were clearly explained and understood by 85% of those who replied to the question (excluding N/A answers), as shown by the inner ring of Figure 4.21.

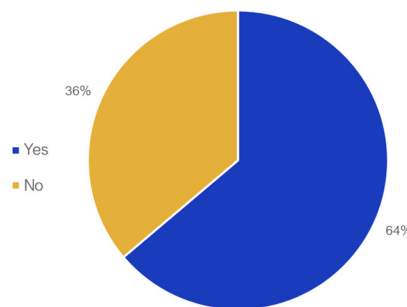
Have you ever had a contract cancelled or terminated early by the customer?  
(Outside Ring)  
If so, were the circumstances or risks outlined, explained and fair process followed?  
(Inside Ring only shown when applicable)



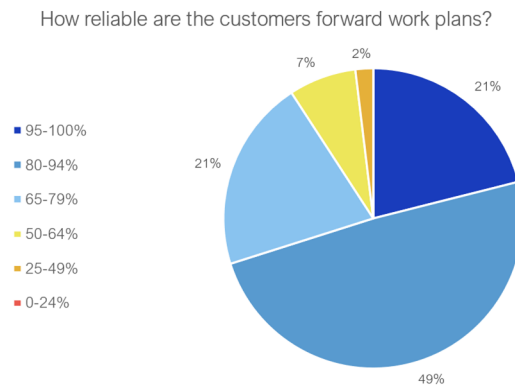
**Figure 4.21: Contracts cancelled or terminated early by the customer**

Customer activity forecasts and forward work plans were regularly received by 64% of respondents (Figure 4.22). Of those forecasts received, 70% were perceived to be reliable more than 80% of the time, 21% were reliable 65-79% of the time, and only 9% were reliable less than 65% of the time (Figure 4.23).

Do you regularly receive customer activity forecasts and forward work plans?

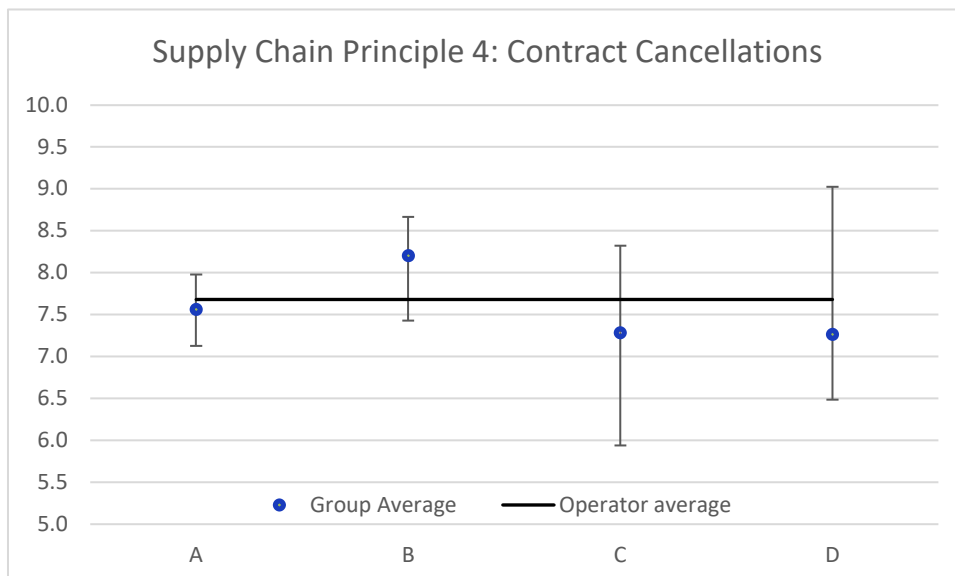


**Figure 4.22: Do you receive regular forward plans from customer?**



**Figure 4.23: Forward plan reliability**

The average score across groups for Supply Chain Principle 4 relating to Contract section was somewhat consistent with an overall average of 7.48, however with larger variation and outliers in groups C and D, as can be seen in Figure 4.24. Interestingly group D scored the lowest on average (7.26) but also the highest for an individual company (9.02). No significant trends were seen between groups for individual questions that would explain some of the group differences. This possibly indicates that company group has low correlation to performance in this section, and differences are primarily company specific. Tier 1's scored below the average across all operator groups which was 7.68, but similar to the lowest scoring operator group which was Group C.



**Figure 4.24: Company Group average scores for SCP4: Contract Cancellations**



#### 4.6.1. Free Text Responses

48 responses were received for this section. General sentiment showed a desire for increased forward planning/forecasting. Contract cancellation appears to be rare, with minimal negative comments were received for this section. Key phrases extracted from the text responses can be seen in the word cloud in Figure 4.25.

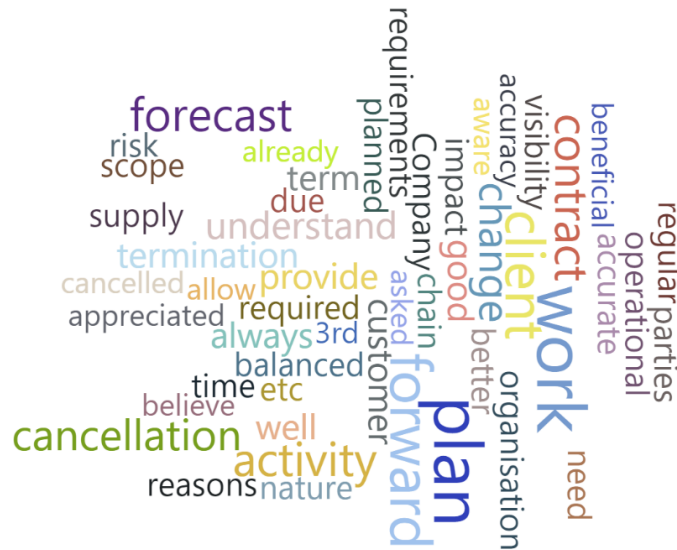


Figure 4.25: Word cloud from free text responses to SCP4: Contract Cancellations



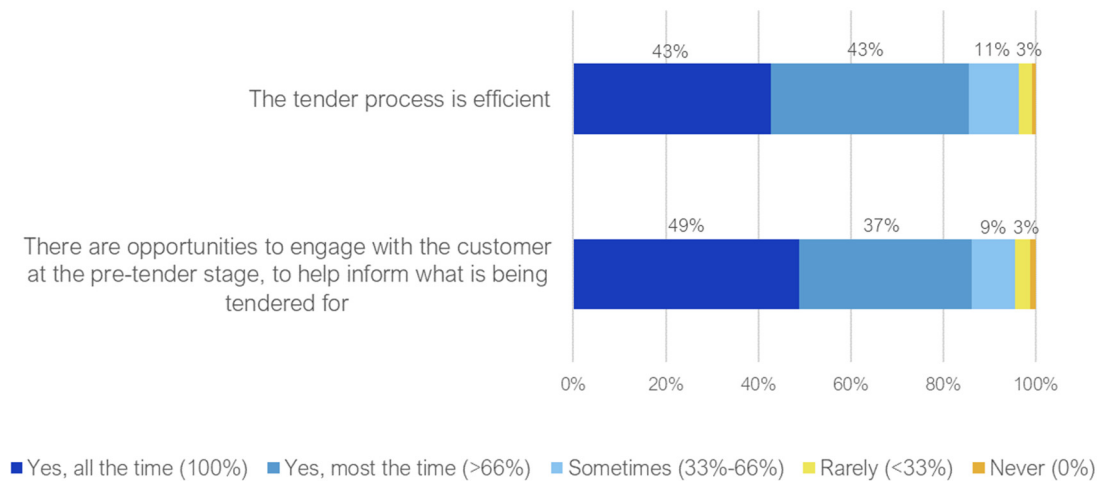


#### 4.7. Supply Chain Principle 5 – Tendering & Auditing Requirements



Most respondents (86%) felt that the tendering process was efficient all or most of the time, with only 3.6% suggesting it is rarely or never efficient, as shown in Figure 4.26.

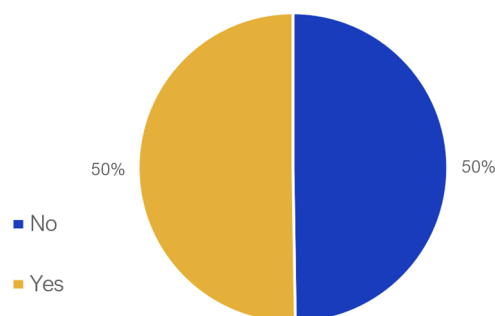
The lower graph in Figure 4.26 also shows that the vast majority (86%) of respondents said that there are opportunities to engage with the customers at the pre-tender stage, which helped inform what is being tendered for at least most or all the time. 9% said this sometimes happened, 5% that this was rarely or never the case.



**Figure 4.26: Analysis of responses related to the tender process**

There was an equal 50%/50% split between whether the customer did or did not request information that was already available in pre-qualification systems or had already been provided, as shown in Figure 4.27. 45% of responses said that the customer participates in repetitive tendering for similar scopes of work (Figure 4.28).

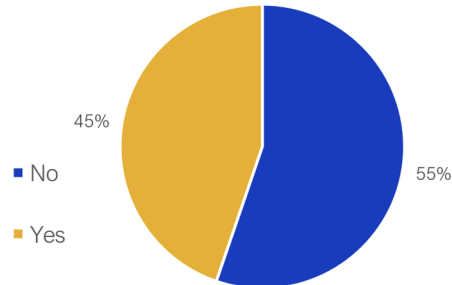
Does the customer request information that is already available in pre-qualification systems or which has been provided previously through another means?



**Figure 4.27: Customer requests previously shared information**



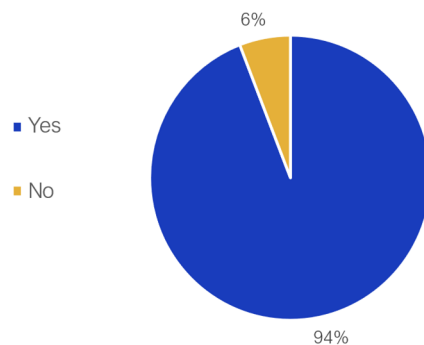
Does the customer conduct repetitive tendering for the same or similar scopes of work?



**Figure 4.28: Customer conducts repetitive tendering**

A majority (94%) of respondents said that the audit requirements from customers were suitable and efficient (Figure 4.29).

Are the audit requirements suitable and efficient?



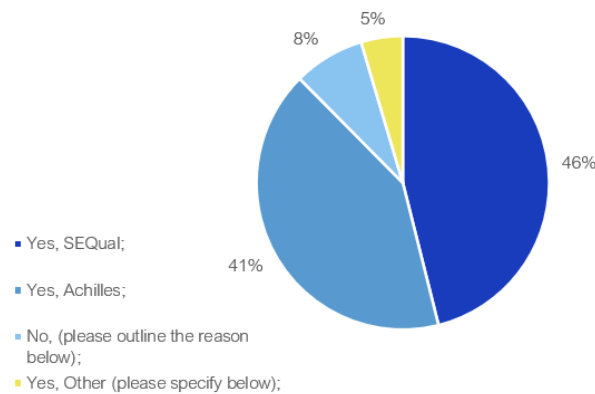
**Figure 4.29: Audits requirements are suitable and efficient**

87% of responses indicated a use of industry pre-qualification systems (Figure 4.30). The use of SEQual reflected 46% of the responses and Achilles 41%. A further 5% were for other systems and 8% for none. Some of the other organisations listed by respondents are listed below:

- Ariba
- GoSupply
- Seatrade
- Internal Qualification Process
- EPIM
- ISO14001
- ISO45001
- ISO9001
- ISNetwork



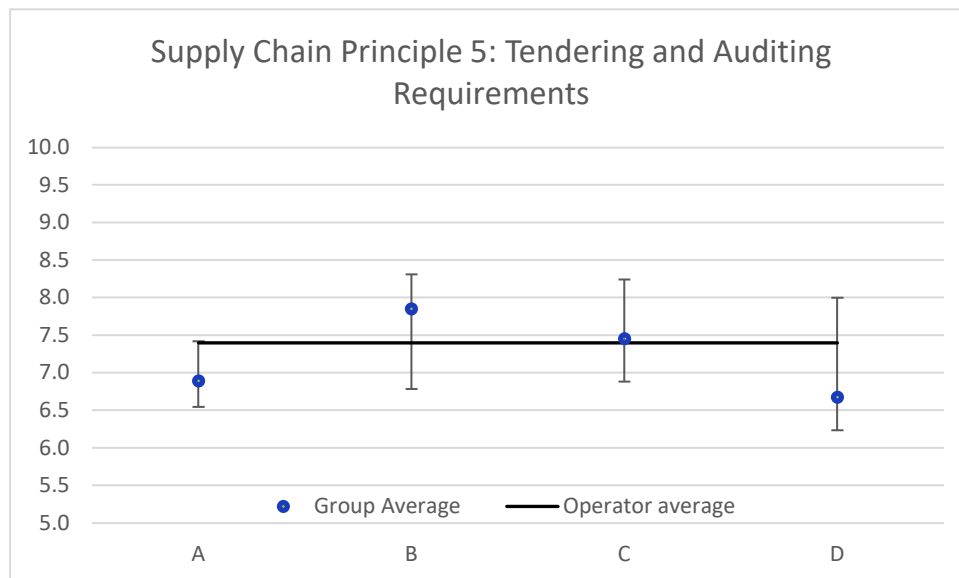
Does your organisation use energy industry pre-qualification systems?



**Figure 4.30: Use of pre-qualification systems**

Adherence to Supply Chain Principle 5 (Tendering and Audit Requirements) with an average score of 7.20 was below the average score across all principles (7.90). The average across all the operator groups was 7.40. Operator Groups B and C were above the average for the principle at 7.85 and 7.45, respectively (See Figure 4.31). Groups A, D were below average at 6.89 and 6.67.

Performance across groups was varied, with group B scoring the highest average and individual score. As in SCP 4, group D scored the lowest on average. Variation was similar across all groups A, B and C. Tier 1 scored the lowest average score for Tendering and Auditing Requirements, as well as the lowest individual score.



**Figure 4.31: Company Group average scores for SCP5: Tendering & Auditing Requirements**





#### 4.8. Supply Chain Principle 6 – Innovation



Maximising the full potential by adding value through innovation was possible for the majority (71%) of responders. 14% said that the customer only focused on costs and 15% responded that they didn't know (see Figure 4.33). Innovation during the tendering process was encouraged some or all the time in 96% of cases, with suppliers responding that they were actively encouraged, some (10%), most (40%) or all (46%), of the time, to submit innovative approaches which may even be outside the work scopes of the tender, as shown in Figure 4.34.

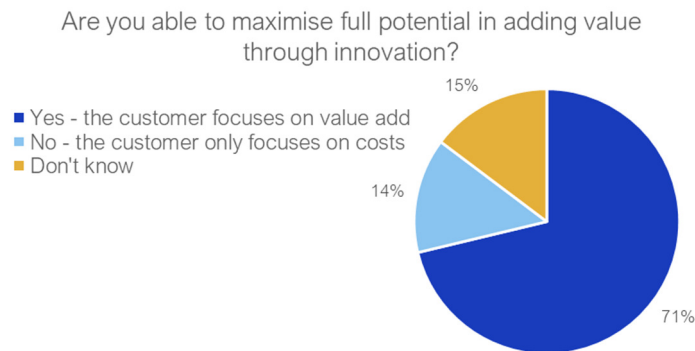


Figure 4.33: Maximising full potential in adding value through innovation

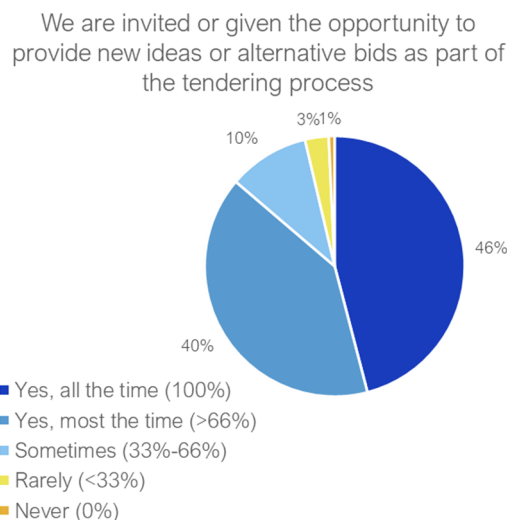
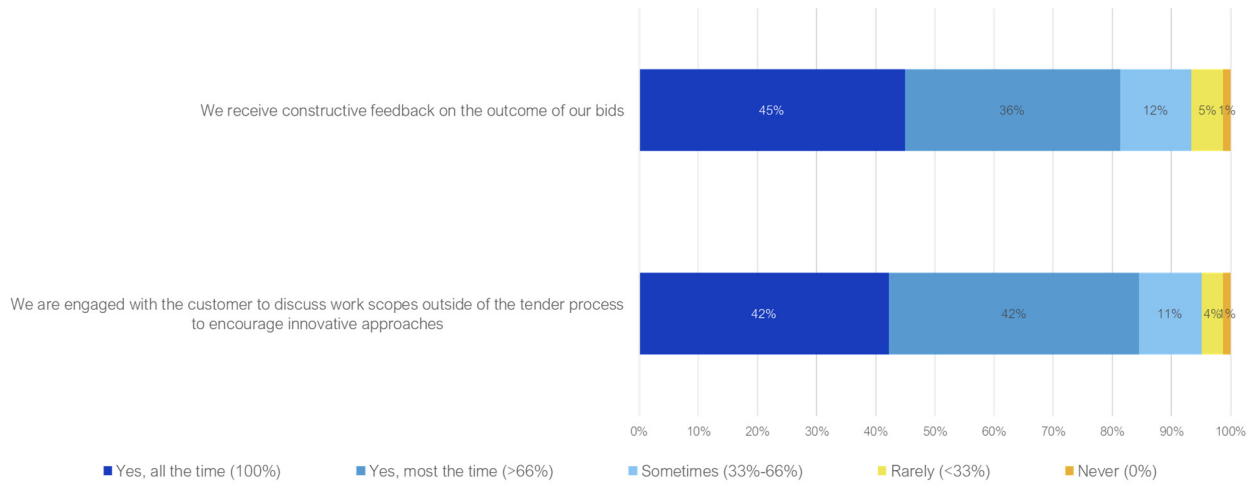


Figure 4.34: Opportunity to provide new ideas or alternative bids

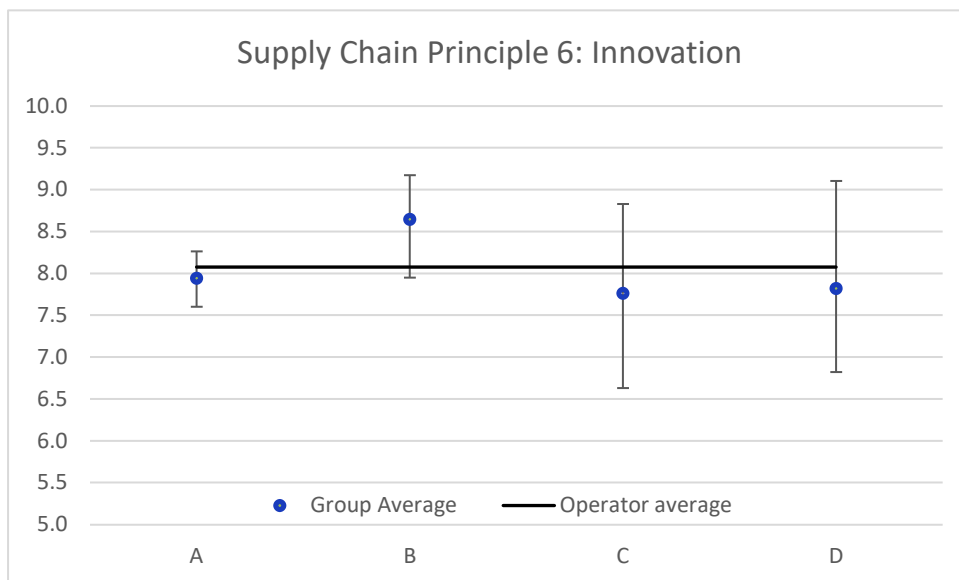
Constructive feedback on the outcome of bids were received all the time for 45% of responders, most of the time for 36%, 12% said sometimes and 7% responded rarely or never. This is shown in Figure 4.35.

In response to whether they were engaged with the customer to discuss work scopes outside of the tender process to encourage innovative approaches, 42% said all the time, another 42% said most of the time, 11% said sometimes and 5% said rarely or never. This is shown in the lower half of Figure 4.35.



**Figure 4.35: Further responses related to engagement with customer for innovation**

Adherence to Supply Chain Principle 6 (Innovation) with an average of 8.03 was slightly above the average score across all principles (7.90). Figure 4.36 shows that Group B was above average for the principle at 8.65 and largely outperformed all other Groups (A, C and D), with both the highest average and individual score. Group A had a very tight spread, while groups C and D had much larger variations. Group B outperformed the other groups in all question responses, with a larger proportion of respondents indicating that they are able to maximise their full potential through innovation. Tier 1's average score was lower than the average across all operator groups (8.12), but outperformed Group C operators in this section with higher average, max, and min scores.



**Figure 4.36: Company Group average scores for SCP6: Innovation**



#### 4.8.1. Free Text Responses

There were 35 free text responses for this section. The majority stated that tenders are usually specific and alternative bids are not applicable or considered. With an overall negative sentiment to the process. There was also uncertainty around the alternative bid process in a tender. A word cloud of the extracted key phrases is shown in Figure 4.37 below.



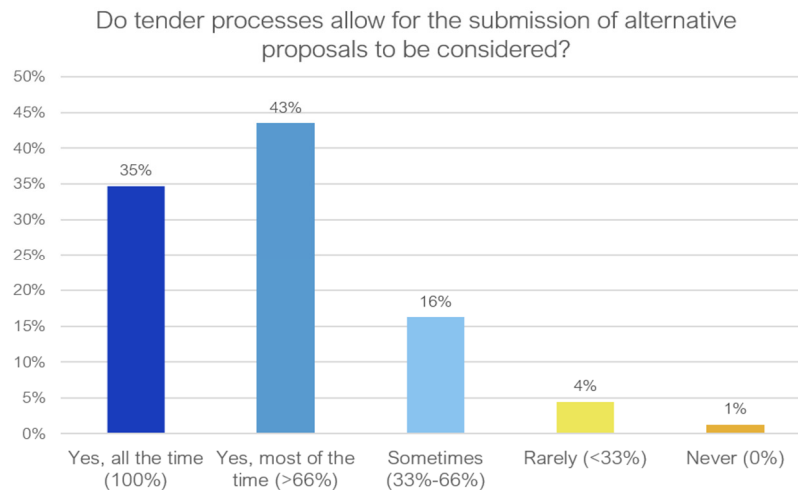
**Figure 4.37: Word cloud from free text responses to SCP6: Innovation**



#### 4.9. Supply Chain Principle 7 – Alternative Bids



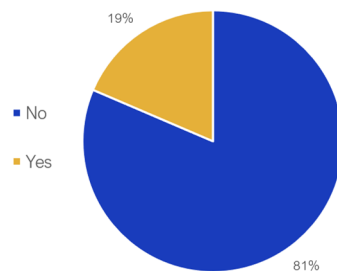
Figure 4.38 shows that alternative bids were considered during tender processes most of the time (43% most of the time, 35% all the time), 16% said sometimes and 6% responded rarely or never.



**Figure 4.38: Tender process allows submission of alternative proposals**

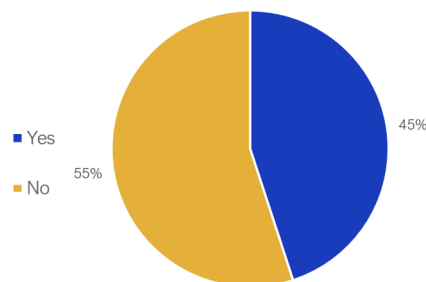
19% of respondents did say they have been asked sometimes to price against an alternative solution by another bidder (see Figure 4.39). Only 45% of respondents said that alternative bids had been successful in the last 12 months, as shown in Figure 4.40.

Do you ever get asked to price against alternative solutions which were shared by another bidder?



**Figure 4.39: Asked to price against solutions shared by another bidder**

In the last 12 months have any alternative bids/proposals submitted by you to this customer been successful?



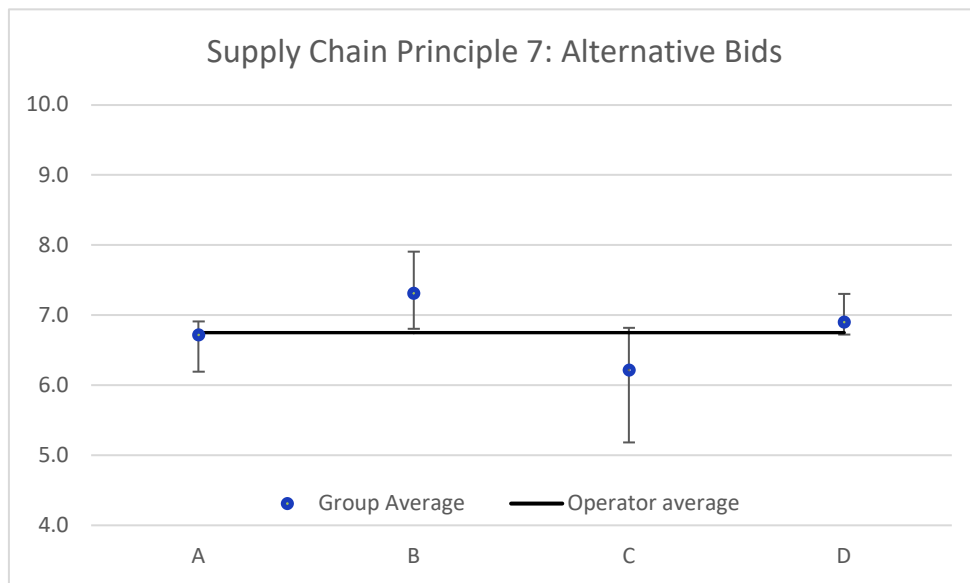
**Figure 4.40: Successful alternative bids in the last 12 months**





Adherence to Supply Chain Principle 7 (Alternative bids) was significantly below the overall average score of 7.90, and the principle with the poorest adherence with an average score for the principle of 6.75. Tier 1 Group D and operator Group B both scored above average for the principle with Group B being the best performer with 7.31. Groups A and C both sat below the average value with Group C being significantly lower than the others at 6.22. See Figure 4.41.

All groups apart from group C had a relatively tight spread with few outliers. Group C had both the lowest average score and individual score (5.18). There were no standout reasons why group C performed the worst apart from general low scoring across the board. Tier 1 companies appeared to perform better than Operators on average (6.77), only scoring lower than Group B.



**Figure 4.41: Company Group average scores for SCP7: Alternative Bids**



#### 4.9.1. Free Text Responses

There were only 24 free text responses to this section of the possible 407. Those that mention alternative bids being used, indicate that they were necessary if value adding or generally reasonable. Multiple responses indicate that their product is bespoke so alternative bids from competitors are unlikely. Key words from the text responses are presented in the word cloud in Figure 4.42 below.



**Figure 4.42: Word cloud from free text responses to SCP7: Alternative Bids**

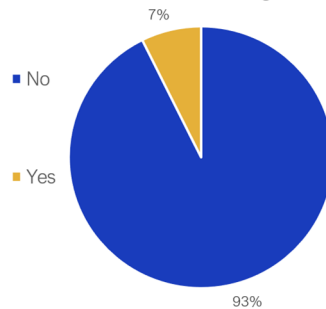


#### 4.10. Supply Chain Principle 8 – Low-ball Bidding



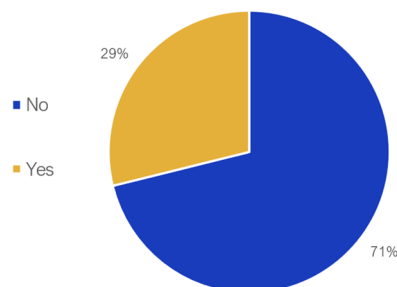
Low ball bidding was experienced sometimes by only 7% of respondents and the remaining 93% felt they had not been encouraged by the customer to submit unsustainable pricing or rates (see Figure 4.43). However, 29% of responses indicated that a contract had to be re-negotiated due to unsustainable pricing (see Figure 4.44).

Have you been encouraged by the customer to submit pricing or rates which are unsustainable? i.e. low-ball bidding



**Figure 4.43: Encouraged by customer to submit Low-ball bid**

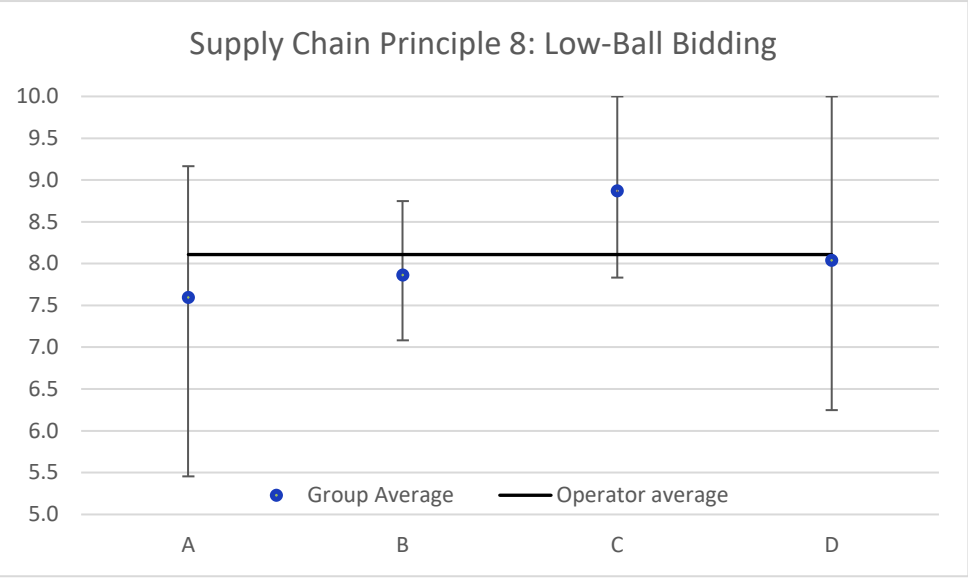
Has a contract required renegotiating due to unsustainable pricing?



**Figure 4.44: Contract re-negotiated due to unsustainable pricing**

Adherence to Supply Chain Principle 8 (Low-ball Bidding) was high in comparison to the other principles, as it scored the second highest overall average (8.24). There was large spread across the groups however, with Groups A and D having the largest variations of nearly 4 points. Groups C scored above average for this principle, with the highest average (8.87) and joint highest individual (10.00) scores. Groups A, B and D scored below the average for the principle with Group A having the worst average score of 7.60. See Figure 4.45.

Analysing the question results for the company groups suggests that low-ball bidding is heavily dependent on company rather than company category, This conclusion is supported by the wide spread across all groups, showing low correlation between operator group and score. For Low-ball Bidding, the average score for Tier 1's was slightly below the average across all operator groups, above the average scores for Group A & B Operators, and with a top individual score of 10, the group had the same highest single score as Group C.



**Figure 4.45: Company Group average scores for SCP8: Low-ball Bidding**

**4.10.1. Free Text Responses**

There were 39 free text responses to this section, with the general sentiment that Low-balling bidding is not uncommon, but most customers understand the pitfalls and issues that come with it. The practise of low-balling does not seem to correlate with company groups but is dependent on specific company behaviour. Key words from the free text responses are presented in Figure 4.46 below.



**Figure 4.46: Word cloud from free text responses to SCP8: Low-ball Bidding**

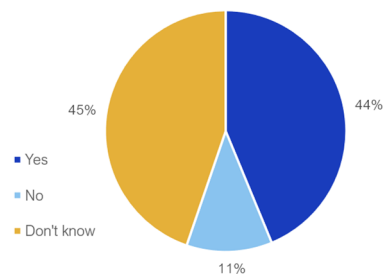


#### 4.11. Supply Chain Principle 9 – Labour Agreements



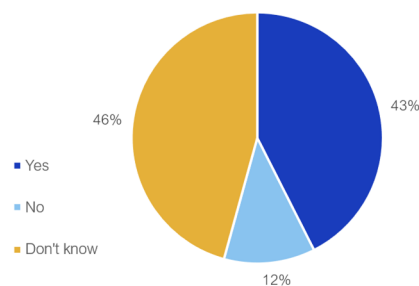
Figure 4.47 and Figure 4.48 show that the largest share of respondents (45% and 46% respectively) indicated they did not know about labour agreements in place across the workforce in their organisations. Of those that were able to answer, most (80%) supported the minimum terms of their respective labour agreement (44% of all respondents). A large share of respondents did not know whether labour agreements allowed them to better manage labour costs. Of those that could answer, 78% indicated that they do allow for better labour cost management (43% of all respondents).

Do you support the minimum terms of respective labour agreements?



**Figure 4.47: Support for minimum terms of respective labour agreement**

Do you feel, labour agreements allow you to better manage labour costs?

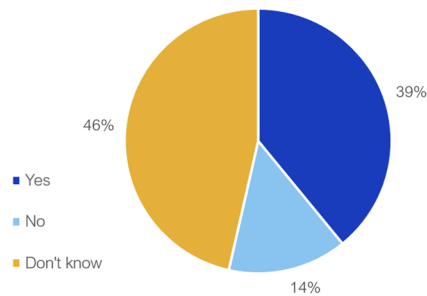


**Figure 4.48: Labour agreements allow better labour cost management**

When asked whether they felt labour agreements aid in recruitment and retention of labour, 46% of respondents answered Don't Know. 74% of those that could answer (39% of all respondents) felt that the agreements do aid in recruitment and retention. See Figure 4.49.



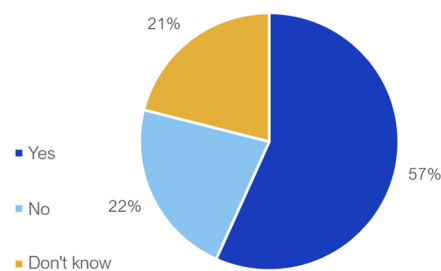
Do you feel, labour agreements aid recruitment and retention of labour?



**Figure 4.49: Labour agreements aid recruitment and labour retention**

In answer to the question of whether contracts had a clear labour rate escalation mechanism that was supported and recognised, 57% of respondents agreed, 22% disagreed and 21% answered Don't Know. See Figure 4.50.

Do your commercial contracts have clear labour rate escalation mechanisms that are supported and recognised?



**Figure 4.50: Contract contain clear labour rate escalation mechanisms**

Supply Chain Principle 9 (Labour agreements) was not included as a ranked principle as part of the evaluation of company owned surveys, as the questions were not reflective of the specific survey owner, but instead reflected the position of the respondents. Therefore, the results are unlikely to reflect the survey owner company's current position or support progress to adhering to this Principle. Relative performance between Groups therefore was not available.



#### 4.11.1. Free Text Responses

52 free text responses were received for this section. There was mixed feelings dependent on the respondent organisation (including their size and sector) of whether labour agreements were relevant and/or beneficial. Key words reflecting the free text responses are presented in Figure 4.51.



Figure 4.51: Word cloud from free text responses to SCP9: Labour Agreements

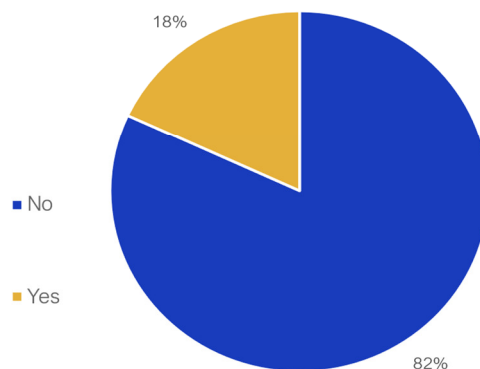


#### 4.12. Supply Chain Principle 10 – Dispute Resolution



Most respondents (82%) indicated they had never had to escalate disputes to the MD level before finding a resolution, as shown in Figure 4.52.

Do you ever need to escalate disputes to managing director or senior management level for effective resolution?

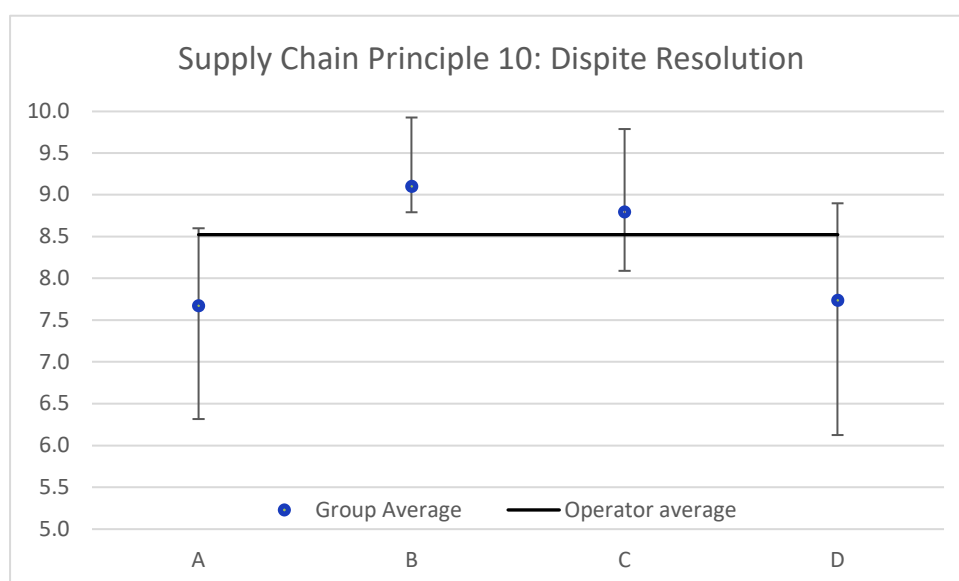


**Figure 4.52: Disputes escalated to management level for resolution**

Adherence to Supply Chain Principle 10 (Dispute escalation) was above the 7.90 average score across all supply chain principles, and the third highest ranked principle or section overall at 8.41.

From the grouped results shown in Figure 4.53, dispute resolution appears to be handled best by groups B and C, with groups A and D having both lower averages and larger variations. As this section consisted of a single question, the below graph shows all available information on this section.

Group B was the best performer relative to the other groups, marginally outperforming Operator Group C, while Groups A and D were the groups with the lowest adherence. This section had the widest variation in average results, most likely due to it being based off of only 1 question. Tier 1's scored similarly to Group A operators for Dispute Resolution, but well below Groups B and C.



**Figure 4.53: Company Group average scores for SCP10: Dispute Resolution**





#### 4.12.1. Free Text Responses

There were only 30 free text responses to this section, however the majority detailed that dispute escalation was typically handled well and at the appropriate level. There was a positive sentiment within these comments, detailing that serious escalation was rare but was dealt with well when it did arise. See the word cloud in Figure 4.54 below for key phrases extracted from the comment data.

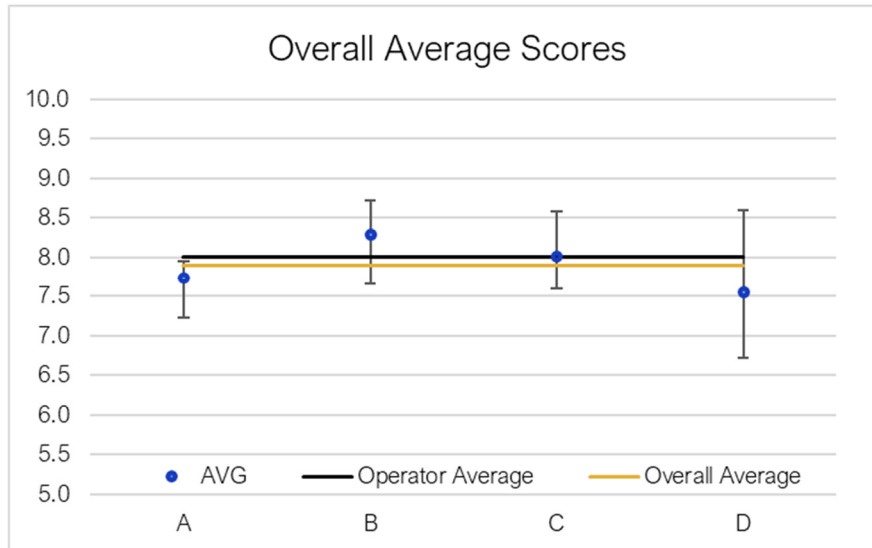


Figure 4.54: Word cloud from free text responses to SCP10: Dispute Resolution



### 4.13. Overall Scoring

There were a total of 23 companies that generated more than 7 survey responses. These companies were scored and categorised based on the methodology described in Section 2. Collective scores for each Group have been presented per Supply Chain Principle throughout this report. The collated Overall Scores for each Company Group are presented below (Figure 4.55).



**Figure 4.55: Overall average scores by Company Group**

Companies within Operator Group B were on average the top performers with an average overall score of 8.30. This was followed by Group C with an overall average score of 8.00. Group A and D performed below the overall average of 7.90 with overall scores of 7.74 and 7.54, respectively.

Group B companies included the company with the highest overall individual score of 8.72, the top scorers in groups C and D scored an overall score of 8.59 each. Group A's highest score was 7.96. The lowest individual score of 6.72 was scored by a Group D company. Group A's lowest scoring company scored a 7.23 overall. Groups B and C's lowest individual scores were 7.65 and 7.59, respectively.

At the end of the survey, respondents were asked if they had any final comments on anything at all, there were 92 free text responses to this question. Generally, the comments were positive, detailing specific relationships with customers.



Below in Figure 4.56 is the final word cloud created using key words extracted from the final comments data.



**Figure 4.56: Word cloud from final comments**



## 5. CONCLUSIONS

Key conclusions from the survey are summarised in this section.

### 5.1. Participation

During the time between July and November when the surveys were active for response, a total of 407 responses were received. This represents a slight 4% decrease over the previous survey in 2021, but this year all surveys were directed at a purchasing company.

23 of the surveys received more than the minimum 7 responses required to be able to receive their results and ranking. One other survey received 3 responses, is also included in the collated results, but did not receive their results themselves or a ranking. 17 of the participating companies related to Operators and 7 to Tier 1 companies. There were also 2 companies that received no responses so were not counted.

The Companies taking part were separating into 4 groups, A B C and D. They were distributed as follows:

- 5 in Operator Group A
- 5 in Operator Group B
- 7 in Operator Group C
- 7 in Tier 1 Group D

Of the responses received, a much larger proportion were related to operators than for the previous surveys. The share of responses was as follows:

- Operator Group A = 34%
- Operator Group B = 19%
- Operator Group C = 28%
- Tier 1 Group D = 19%

### 5.2. General Sentiment

The Working As One survey results have enabled insight into supply chain behaviours and sentiment. As well as responses to the supply chain principle questions, feedback was collected in the form of free text responses to each section. 90% of respondents agreed that the Supply Chain Principles were widely understood within their organisation, with 9% responding neutral and 1% disagreeing.

In terms of the Supply Chain Principles themselves, SCP 3, relating to skills and competencies was the principle that scored most highly across all companies, with an overall average of 9.3. SCP 7, related to alternative bidding scored the least across the board, with an overall average of 6.77. This pattern is consistent with previous survey results, indicating that this aspect is an area for greatest improvement.

### 5.3. Supply Chain Principle Differences and Focus Areas

#### 5.3.1. General Comparison of Groups

Operator Group A on average, performed best compared to the other operator groups for Supply Chain Principle 3. This was led by Operator Group C in the 2021 WaO survey.

Operators in Group B on average, performed best out of all companies for Supply Chain Principles 1 (Risk and Reward), 4 (Contract Cancellations), 5 (Tendering and Audit Requirements), 6 (Innovation), 7 (Alternative Bids) and 10 (Dispute Resolution). This is an improvement over the 2021 WaO survey, with the Group B operators now also leading in Supply Chain Principles 4, 5 and 6, where in 2021 they led in only Supply Chain Principles 1, 7 and 10.



Group C operators performed better than the other groups on average for Supply Chain Principles 2 (Payment Performance) and 8 (Low-Ball Bidding).

Tier 1 group D companies did not perform best in any sections but did perform above average for Supply Chain Principles 3 (Competency & Skills), 6 (Innovation), 7 (Alternative Bids) and 8 (Low-ball Bidding). For Supply Chain Principles 3, 7 and 8, the Tier 1 Group D also did better than the average across all operators.

### 5.3.2. Comparison of Group performance by SCP

For Supply Chain Principle 1 (Risk and Reward), there was typically good adherence to the principles. However, similar to the previous survey, this section performed slightly below the overall average. When considering the Operator Groups, Groups B and C outperformed Groups A and D.

The responses to Supply Chain Principle 2 (Payment Performance) were typically positive apart from the performance of the Tier 1 Group D companies. It was clear that their longer payment terms and larger percentage of late payments contributed to their significantly lower score in this section. Considering the ranked questions, the adherence to this principle was above average compared to the other principles, with Group D ranked lowest and Group C ranked highest. These results are similar to the 2021 survey.

Supply Chain Principle 3 (Competency and Skills) scored the highest overall for all operator groups. Groups A and D scored above average. Compared to the previous survey, group D improved their average, with all groups averaging above a 9.

Supply Chain Principle 4 (Contract Cancellations) scored slightly below average overall, with Operator Group B outperforming the other groups. The main reason for the below average scoring appeared to be the lack of, or poor reliability, of forward work plans/activity forecasts. A very small percentage of respondents had had contracts cancelled or terminated early without fair process or explanation. While Operator Group B performed best overall, the highest individual score belonged to a Tier 1 company. In the 2021 survey the Tier 1 group performed best overall for this section.

Adherence to Supply Chain Principle 5 (Tendering & Auditing Requirements) was one of the lowest of the survey, with an average score of 7.20. On average, Groups B and C outperformed Groups A and D. This is again a similar result to the previous survey, with Group D performing worst in both surveys. The apparent reason for this section's below average scores was the high amount of responses indicating repetitive tendering, as well as customers requesting information that is already available or previously provided.

Supply Chain Principle 6 (Innovation) scored above average (8.03), with group B again outperforming the rest of the groups. There were a low amount of negative responses to the questions, with most respondents indicating that they were able to maximise their full potential through innovation. Performance was generally better than in the 2021 survey, with the average scores increased. The Group leader changed from Group C to B.

Adherence to Supply Chain Principle 7 (Alternative Bids) was significantly below the average section score, scoring the lowest of all of them (6.77). This again reflected the previous surveys results, where SCP 7 also scored the lowest (6.07). While an improvement, a majority of responses indicated that no alternative bids/proposals had been successful in the past year. Group B outperformed the rest of the groups on average, with Group D moving from first place in 2021 to second place this time. Group C scoring the lowest average score in both surveys as well as the lowest individual scores.

Supply Chain Principle 8 (Low-Ball Bidding) saw higher than average adherence (8.24). with only 7% of respondents experiencing instances of low-ball bidding. Further comparison was not possible due to this section not being scored previously. Group C outperformed the others, with large variation on responses being seen in all groups especially groups A and D.



As Supply Chain Principle 9 (Labour Agreements) was not scored in the context of the survey owners, but more related to the survey respondents, comparison of groups is not possible. For all questions, a large proportion of responses replied, “Don’t Know”, indicating that the use or benefit of labour agreements are not widely known or understood across supplier organisations. Of those that could answer, the majority responded positively to the use and effectiveness of labour agreements.

Supply Chain Principle 10 (Dispute Resolution) had the second highest average score (8.41), the same as previous survey results. Group B averaged the highest score (9.10), overtaking Group D which scored highest in 2021. This time groups A and D performed similarly in both average score and high/low scores.



## APPENDIX 1. PREVIOUS SURVEY TABLE OF SCORES

Table 5.1: Average scores for ranked section by Group from 2021 Working as One Survey

Groups	Energy Transition	Supply Chain Principle 1	Supply Chain Principle 2	Supply Chain Principle 3	Supply Chain Principle 4	Supply Chain Principle 5	Supply Chain Principle 6	Supply Chain Principle 7	Supply Chain Principle 10	Average	Variance
<b>A</b>	8.24	6.99	7.54	9.84	7.56	7.07	7.04	5.51	8.07	<b>7.54</b>	<b>1.37</b>
<b>B</b>	8.62	7.77	8.04	9.93	7.39	7.52	7.43	6.22	8.46	<b>7.93</b>	<b>1.06</b>
<b>C</b>	8.02	7.70	8.37	10.47	7.39	8.98	8.03	6.20	8.35	<b>8.17</b>	<b>1.35</b>
<b>D</b>	7.40	7.30	7.42	8.59	8.70	6.72	7.36	6.37	8.74	<b>7.62</b>	<b>0.75</b>
<b>Average</b>	<b>8.07</b>	<b>7.44</b>	<b>7.84</b>	<b>9.71</b>	<b>7.76</b>	<b>7.57</b>	<b>7.46</b>	<b>6.07</b>	<b>8.40</b>	<b>7.82</b>	