



Two futures for jobs in an AI era

2026 Global AI Jobs Barometer

Energy, Utilities and
Resources Analysis



Key findings

AI is driving productivity, accelerating skills change and starting to create a redesign of entry level work

AI is strongly linked to significant productivity gains

Since 2022 when AI use soared, companies in the sectors most exposed to AI have tripled their lead in workforce productivity growth over the least AI-exposed companies.

Companies achieving the biggest productivity gains are boosting wages and headcount

Rather than replacing jobs at scale, leading organisations are using AI to amplify human performance and create value.

Harnessing AI is accelerating skills transformation

Skills required for the most AI exposed jobs are changing twice as fast as in least exposed roles - a 75% increase over last year's gap.

Redesigned entry level pathways

AI exposed junior roles are 7x more likely (than the least AI exposed junior roles) to demand traditionally senior skills like leadership and strategic thinking.

A two-track labour market

Jobs professionalised by AI – where AI does the basic work leaving more expert tasks for people (22% of advertised jobs) - are thriving while jobs democratised by AI – where AI takes on the complex work (52% of advertised jobs) - fall behind.

40%

Productivity growth is 40% higher at most vs least AI exposed companies.

52%

The most AI exposed companies see faster headcount growth than the least AI exposed (52% vs 36%) and higher wage growth (24% vs 17%).

2.5x

The most AI exposed jobs are adding tasks that rely on human-intensive skills like empathy, judgment and creativity 2.5x faster - than the least AI exposed roles.

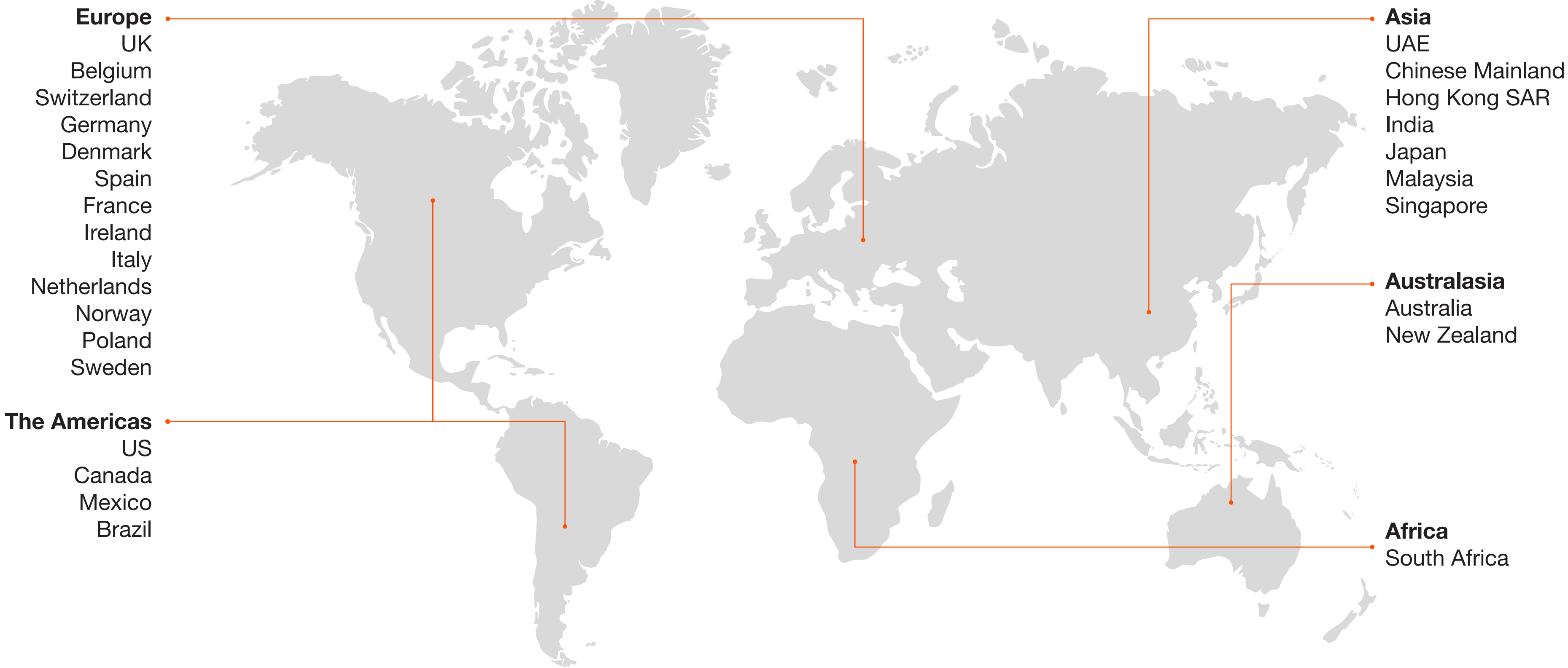
35%

AI-exposed 'seniorised' entry level roles are thriving with 35% growth since 2019 while other entry level roles decline in number.

42%

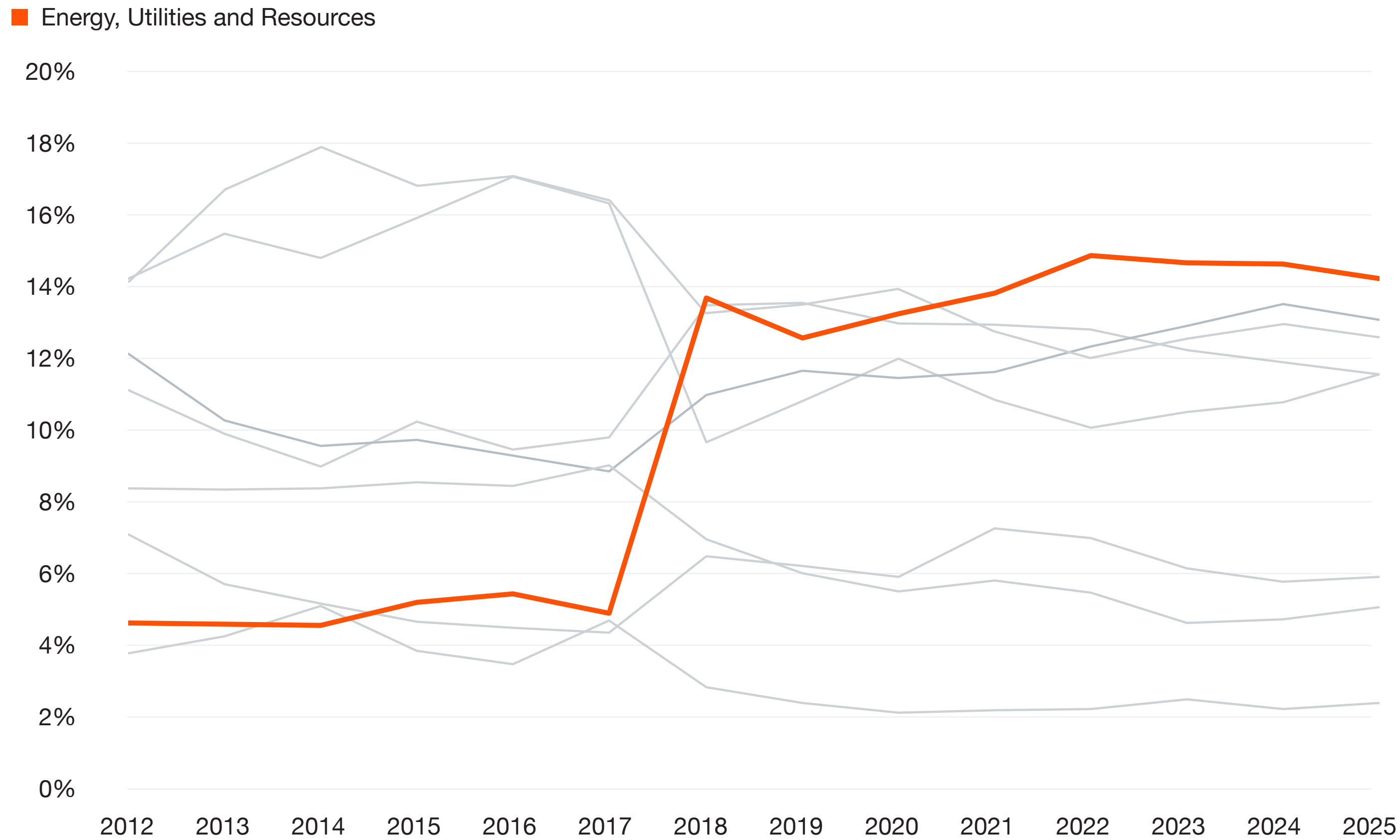
Professionalised jobs are growing twice as fast as Democratised jobs with 42% higher wage growth since 2021.

The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity



Energy, Utilities and Resources remains the largest hiring sector, with a consistently high share of total job postings

Share of total job postings in the Energy, Utilities and Resources sector, globally (% , 2012 to 2025)



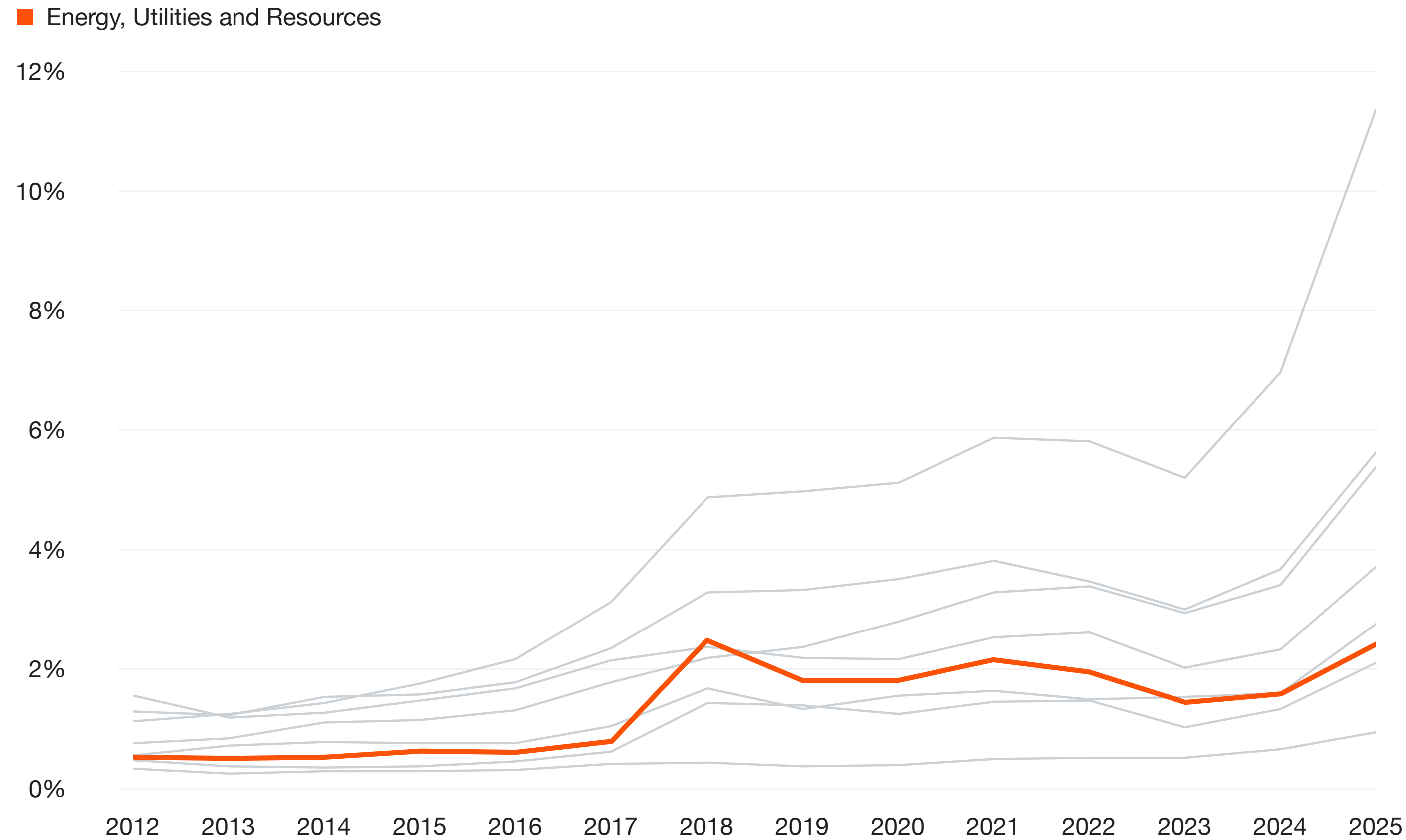
Findings

- In 2025, the sector accounts for 14.2% of total job postings, the highest share among the key sectors analysed.
- Its share has remained broadly stable since 2018, indicating sustained and structural labour demand.
- **Note:** The step-change between 2017 and 2018 may partly reflect changes in Lightcast data coverage, source mix or sector classification. The main trend interpretation should focus on the post-2018 period, where Energy, Utilities and Resources remains consistently one of the largest hiring sectors.

Source: PwC analysis, Lightcast data

AI hiring is gradually increasing in the Energy, Utilities and Resources sector

Share of AI jobs within the Energy, Utilities and Resources sector, globally (% , 2012 to 2025)



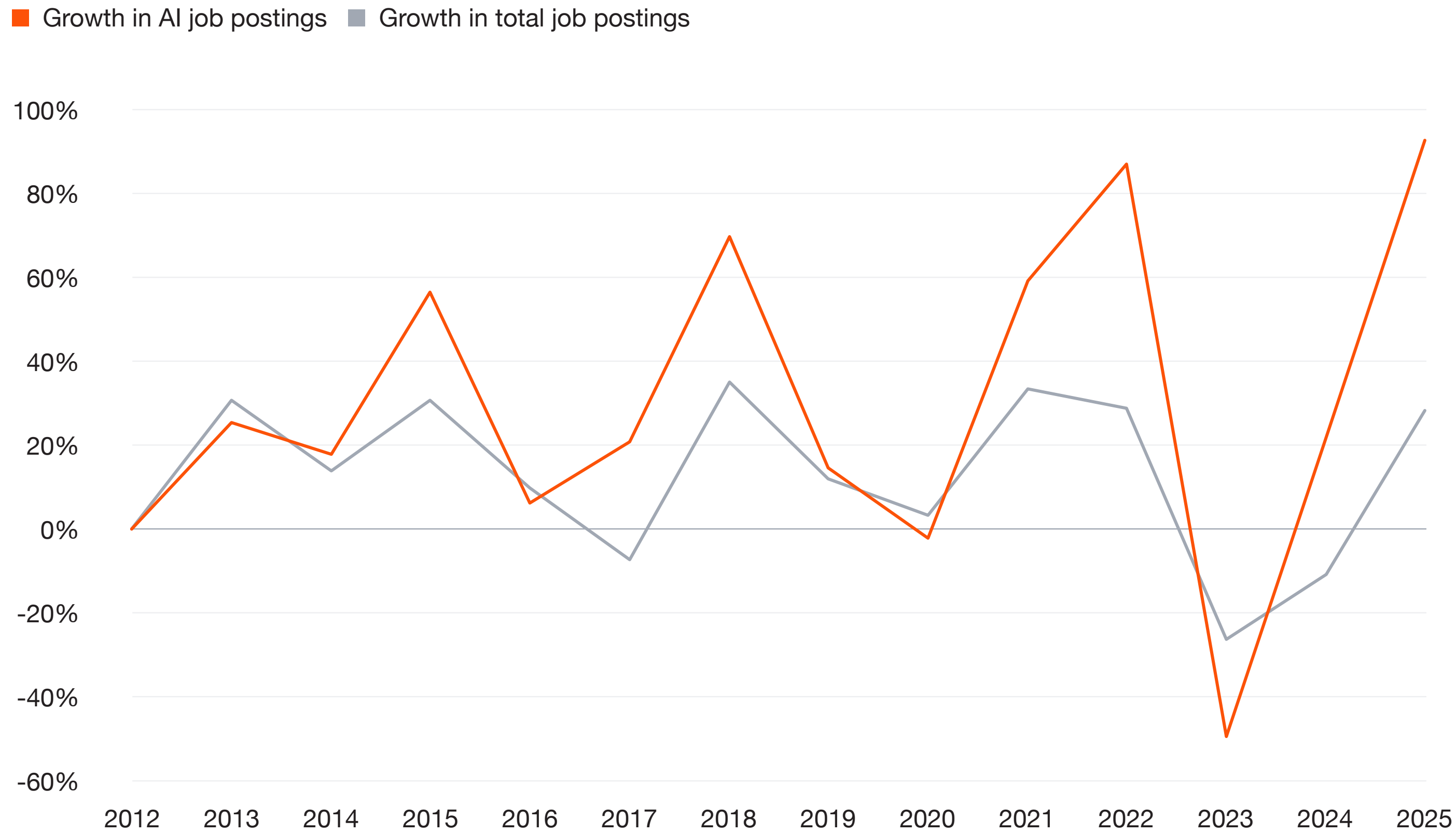
Findings

- In 2025, AI roles account for 2.4% of total job postings in the sector, up from 1.6% in 2024.
- While the overall share remains modest, the year-on-year increase signals steady progress in AI adoption.
- The gradual rise suggests firms are beginning to embed AI into operational and technical functions, though uptake remains measured rather than rapid.

Source: PwC analysis, Lightcast data

AI hiring is accelerating alongside a broader sector rebound, and outpaces overall job growth in recent years

Growth in total job postings and AI job postings for the Energy, Utilities and Resources sector, globally (% , 2012 to 2025)



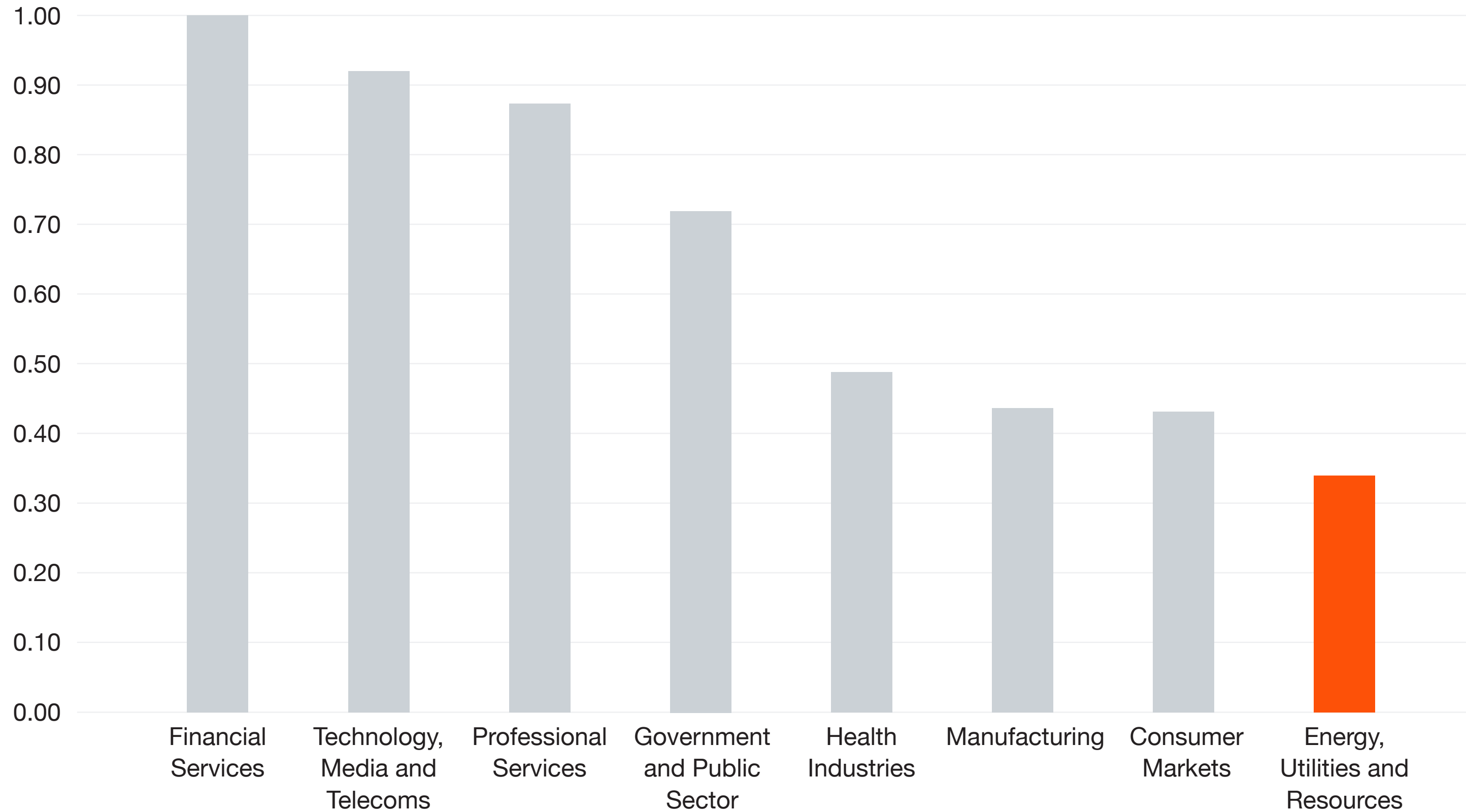
Source: PwC analysis, Lightcast data

Findings

- In 2024, total job postings declined by 10.8% while AI roles grew by 21.9%; by 2025, total hiring rebounded strongly to 28.1%, with AI postings growing by 92.4% relative to 2024.
- While part of the AI uplift reflects the wider recovery in sector hiring, AI growth continues to significantly outpace overall job growth.
- Hiring in Energy, Utilities and Resources appears more cyclical than in other sectors, likely reflecting commodity price movements, capital investment cycles and large-scale project timing.
- Even within this cyclical pattern, the faster pace of AI growth suggests adoption is gradually intensifying rather than purely tracking broader hiring swings.

The sector's relatively modest AI hiring intensity is consistent with its position as the least AI-exposed sector

PwC AI industry exposure by sector (2026)



Findings

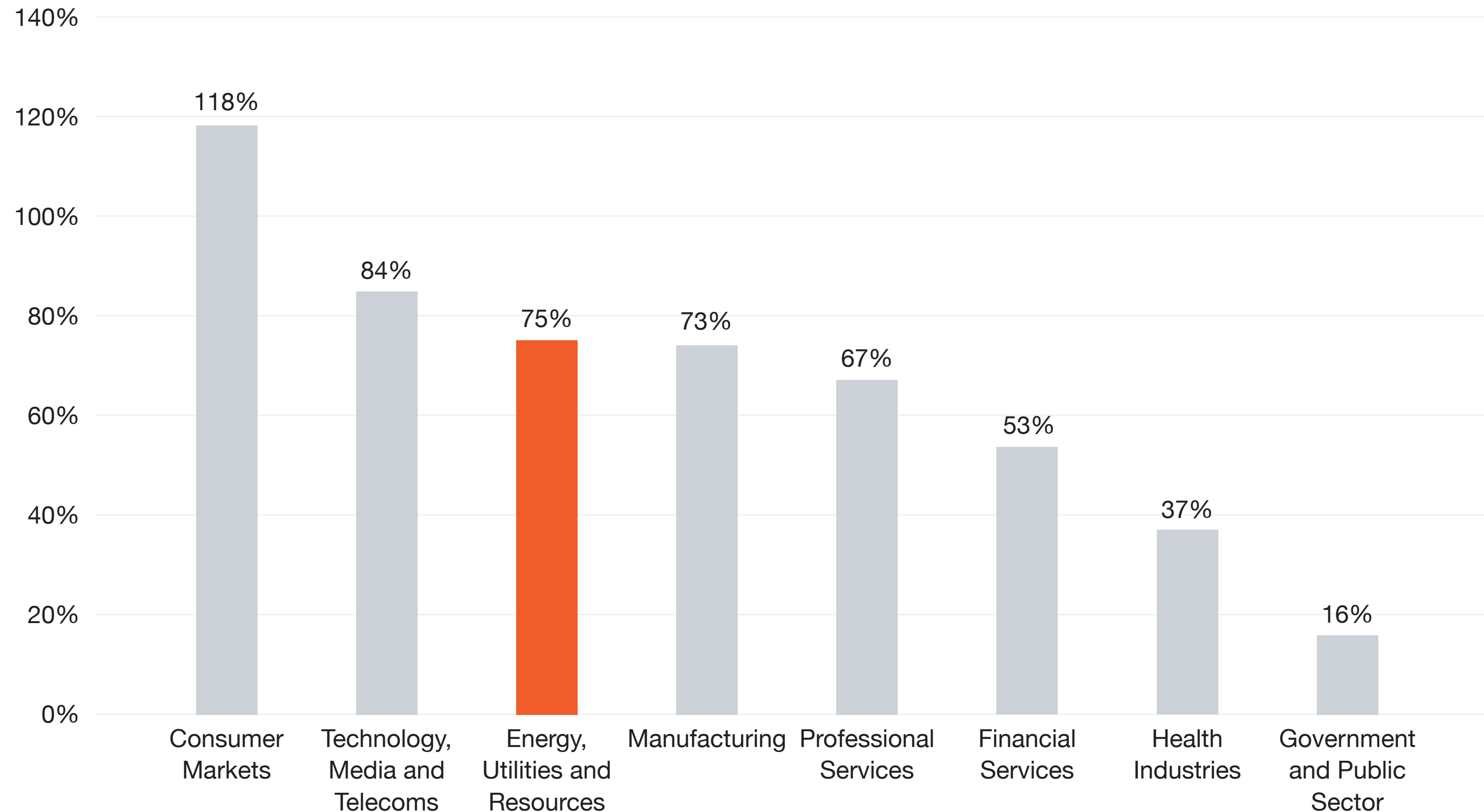
- According to our AI Industry Exposure Index, Energy, Utilities and Resources ranks lowest among the sectors analysed, indicating a smaller share of roles with tasks readily supported or automated by AI.
- This lower structural exposure helps explain why AI hiring, while accelerating in upcycles, remains a relatively small share of overall demand.

Source: PwC analysis, Lightcast data

Notes: AI sector exposure scores and rankings displayed in the chart are sourced from the PwC AI Industry Exposure Index. Dataset and methodology available upon request.

Despite low exposure to AI, AI-enabled roles in Energy, Utilities and Resources commands a relatively high wage premium

Average wage premium for AI related skills by sector, globally (% , 2025)



Findings

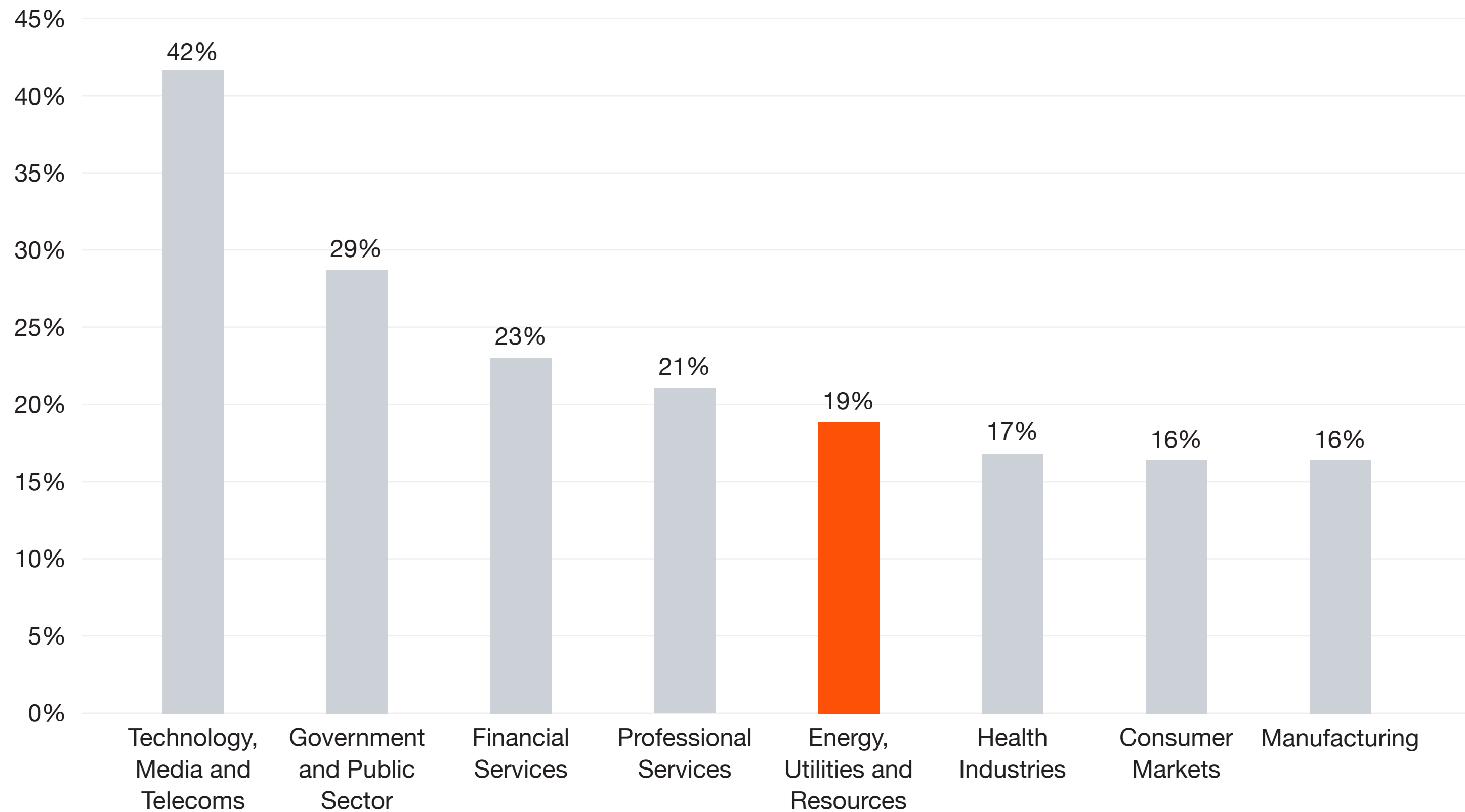
- In 2025, AI-enabled employees in Energy, Utilities and Resources earn a wage premium of 75% relative to non-AI roles, higher than most other sectors.
- The combination suggests that, although AI roles are fewer, they may be more concentrated in high-impact, high-value functions.
- Rather than broad-based adoption, firms may be selectively hiring advanced AI talent into strategically important areas, where the productivity and commercial returns justify higher compensation.

Source: PwC analysis, Lightcast data

Notes: (i) To calculate wage premiums, we split job postings within a sector by AI and non-AI jobs. From here we estimate the wage premium (difference) within the sector for wages in the AI group compared to the non-AI group. This analysis is not a growth rate but rather a snapshot of a given year. Note that only the eight PwC aligned sectors are shown in the visual.

Lower AI exposure in Energy, Utilities and Resources is reflected in a more modest productivity growth

Growth rate in productivity by sector, globally (% , 2018-2025)



Findings

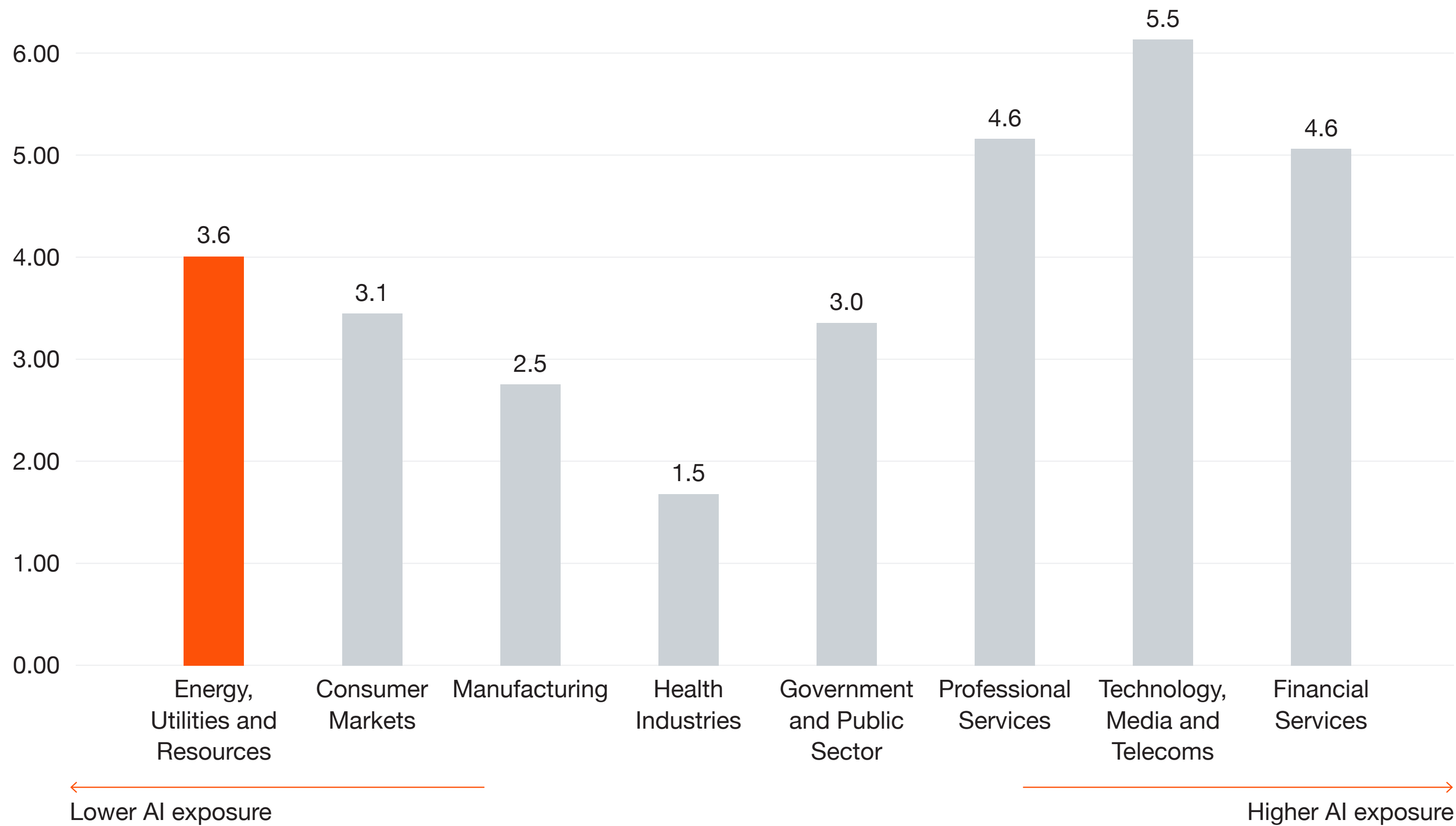
- The sector records productivity growth of 19%, placing it on the lower end relative to other sectors, though not the lowest.
- This is consistent with it being the least AI-exposed sector, suggesting more limited scope for AI-driven efficiency gains.
- Overall, the data indicates that lower AI integration may be contributing to comparatively modest productivity improvements.

Source: PwC analysis, ORBIS data

Notes: Productivity is measured by turnover per employee using ORBIS data. We compute the growth rate in productivity between 2018 and 2024/25 at company level and aggregate up to sector level. Includes company data from all countries in the 2026 AIJB scope. 2025 data is used for companies where available, otherwise we default to 2024 data. Sectors are mapped from two-digit 2022 NAICS to the closest match(es) amongst the eight key PwC sectors. See productivity analysis appendix for all data cleaning filters applied.

The sector is undergoing one of the fastest rates of skills transformation across the economy, likely driven by non-AI factors due to its low exposure

Net skill change by AI exposure for key sectors, 2019-2025, globally



Findings

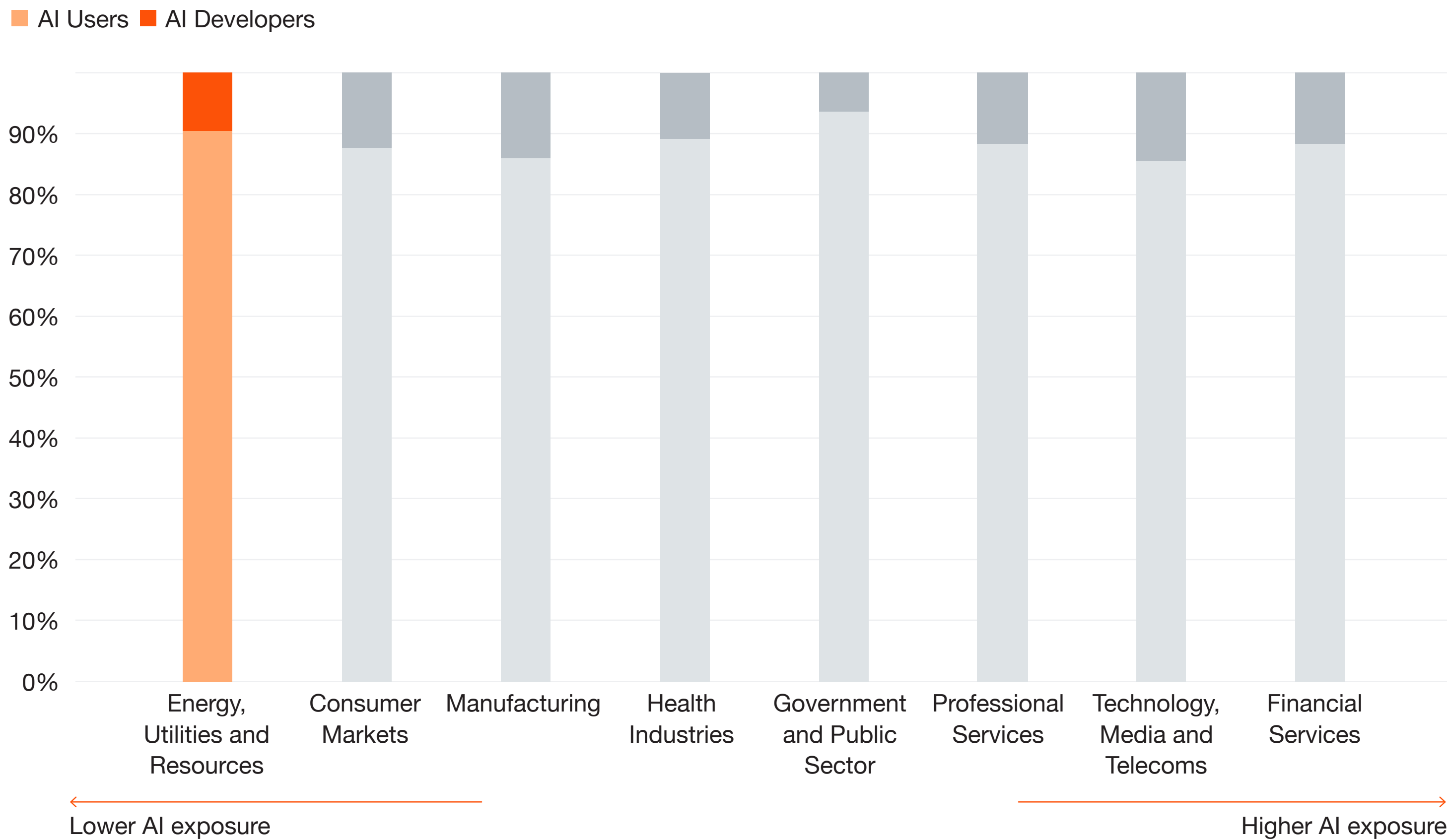
- Between 2019 and 2025, Energy, Utilities and Resources records a net skills change of 3.6 - the third highest across sectors, despite ranking lowest on AI exposure.
- The pace of change likely reflects decarbonisation efforts, the energy transition, regulatory shifts and infrastructure modernisation in addition to AI related skills being required.

Source: PwC analysis, Lightcast data

Notes: Net Skill Change (NSC) measures how much the mix of skills required for a role is changing over time (2019 vs 2025). It is calculated by summing the absolute increases and decreases in the frequency of skills mentioned in job postings. Higher values indicate greater change in required skills, not necessarily more skills overall. Values are averaged across sectors.

Within the sector, AI hiring is focused on applying AI to operational environments, supported by a more selective technical talent base

Shares of AI User and AI Developer job postings of all AI related roles, Energy, Utilities and Resources, 2025, globally (%)



Findings

- In 2025, AI user roles account for 91% of AI related job postings in Energy, Utilities and Resources, compared with 9% for AI developer roles. This shows that most demand is focused on applying AI within business and operational functions rather than on specialist build roles alone.
- That mix fits a sector where much of the value comes from deploying AI across large scale physical assets, field operations and planning processes, including maintenance, network management, production optimisation and risk monitoring. The developer share remains meaningful, pointing to continued demand for technical talent to tailor tools, connect them to operational systems and support implementation in complex industrial settings.

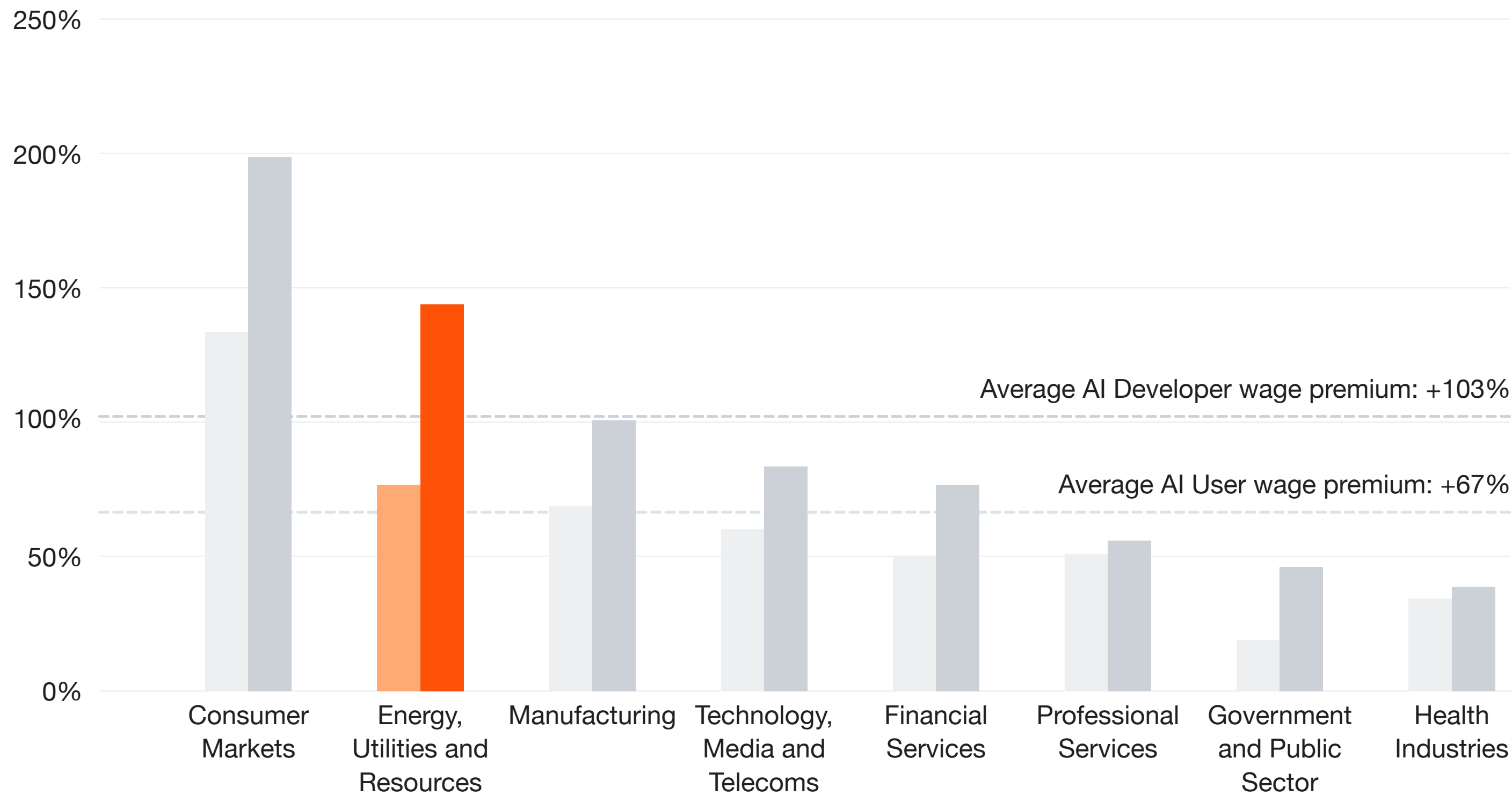
Source: PwC analysis, Lightcast data

Notes: We only include the countries for which data is available from 2012 in our sample.

Despite representing a smaller share of hiring, developer roles in Energy, Utilities and Resources command a markedly stronger wage premium

AI User and AI Developer wage premiums, Energy, Utilities and Resources, globally, 2025 (%)

AI Users AI Developers



Findings

- In 2025, AI user roles in Energy, Utilities and Resources carry a wage premium of +77%, while AI developer roles carry a premium of +145% relative to non AI roles in the sector. This indicates that although most AI hiring is concentrated in user roles, the market places a particularly strong premium on advanced technical AI capability.
- Both premiums sit well above the overall cross sector averages, suggesting that AI skills are particularly highly valued in Energy, Utilities and Resources. Rather than reflecting broad based technical intensity across the sector, the scale of the uplift may point to AI demand being concentrated in a smaller number of specialist, highly rewarded roles.

Source: PwC analysis, Lightcast data

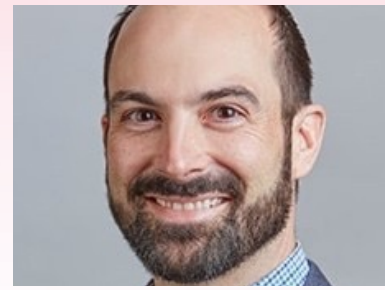
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