

Executive Summary

NOPSEMA & OIR Stakeholder Survey - 2025

In 2025 NOPSEMA commissioned MCM Strategic Communications to undertake an independent stakeholder survey. The project evaluated the performance and effectiveness of NOPSEMA and the OIR based strictly on their statutory functions.

Survey Overview

Out of 90 organisations invited to participate in the 2025 NOPSEMA and OIR Stakeholder Survey, 50 individuals registered for the online survey and 34 completed the survey. Participants represented a broad cross section of key external stakeholder groups, including the fishing and seafood industry, conservation organisations, Indigenous representative bodies, regulated entities, government agencies, unions, the NOPSEMA Advisory Board and the Community and Environment Reference Group.

The regulation of Australia's oil and gas industry occurs in one of the country's most contested public policy environments, with numerous stakeholders holding strong and often publicly expressed views. These perspectives are heavily

influenced by the industry's regulatory framework, safety performance and the actions of its regulators, underscoring the complex task regulators face in balancing competing stakeholder interests while ensuring the highest standards of safety. Feedback on the effectiveness of legislation and regulatory frameworks was out of scope, though some stakeholders voluntarily commented on these areas.

Stakeholders highlighted the significant economic importance of the industry, noting its critical role in supporting the national economy and maintaining reliable power supply across Australia. While respondents emphasised that this economic weight should not affect regulatory decision-making, they stressed that it remains an important contextual factor whenever matters related to the industry are considered.



Figure 1: Sentiment snapshot compiled using frequent phrases used in survey responses.

Survey Themes – NOPSEMA

The following provides an overview of the stakeholder survey results relating to NOPSEMA. Survey results at a glance are provided in Figure 2, with the following sections providing an insight into survey question themes and responses.

Performance & Effectiveness

Stakeholders overall view NOPSEMA’s performance and effectiveness as high, despite the tendency for regulated entities to hold critical views of regulators. Both interviews and survey responses showed strong overall ratings, with only a small number of outlier organisations expressing notably negative views. More than half of online respondents rated NOPSEMA as performing “very effectively” or “effectively,” reinforcing that

negative assessments are the exception rather than the norm.

Confidence in NOPSEMA remains strong, with more than 80 per cent of survey respondents reporting medium to very high confidence. Stakeholders also overwhelmingly agree that NOPSEMA demonstrates independence and fairness, and many view it as more professional and effective than other regulators they deal with. Only a very small proportion felt NOPSEMA is struggling to manage pressure from environmental stakeholders, indicating that this concern is limited and not widely shared.

Change in performance and effectiveness in the past two years

The survey tested change in NOPSEMA’s effectiveness and performance over past two years, a period in which major changes in senior

management and other consequential changes have taken place.

Stakeholders reported that NOPSEMA's performance and effectiveness have improved significantly, with average ratings rising from around 5.3–5.4 (perceived performance two years ago) to 6.3–6.6 out of 10 (for performance in 2025). Stakeholders attribute this improvement to broader and more inclusive stakeholder engagement, an increased overall engagement profile, and positive leadership changes including the appointment of CEO Sue McCarrey and Deputy CEO Graham Blair.

Regulation by NOPSEMA

Despite increasing regulatory complexity, often driven by external legal challenges, stakeholders expressed confidence in NOPSEMA's processes. Stakeholders noted a growing compliance burden, with higher resource demands, longer approval timeframes, although this was attributed to increasing legislative complexity outside NOPSEMA's control.

Many viewed actions such as requesting further information on seismic surveys as evidence of sound decision-making, and around 70 per cent said enforcement was professional and fair. Views on balancing innovation with safety were mixed, with debate continuing around ALARP expectations.

Overall, more than 60 per cent of online respondents agreed NOPSEMA is focusing on the right issues. Awareness of its national priorities varied, but feedback generally reflected confidence that NOPSEMA's regulatory approach remains proportionate, credible and effective despite the complex environment.

NOPSEMA Staff

Stakeholders provided positive feedback about NOPSEMA staff, consistently distinguishing the challenges of regulating a complex industry from the conduct of individual personnel. Staff were

widely described as high-calibre, proactive and responsive, with more than 96 per cent of survey respondents stating that NOPSEMA employees demonstrate the organisation's values at least "sometimes," and none saying they fail to demonstrate them.

Engagement with stakeholders was viewed favourably, with over 75 per cent rating these interactions as effective or very effective.

Feedback on NOPSEMA's systems and technology was also broadly positive, with more than 40 per cent of respondents rating them as effective, and no significant concerns raised in interviews. A recurring theme across respondents was staff willingness to engage openly with external stakeholders.

Communication/education

Stakeholders were positive about NOPSEMA's communication and education activities, describing the current approach as strong but with room for enhancement. Most felt the amount of communication was about right, though some suggested slightly more—delivered carefully to avoid overload.

Use of the website and The Regulator was high, and guidance and educational materials received positive ratings, though stakeholders noted that guidance should not be treated as regulation. The Regulator, in particular, was identified as a quality publication and well-read source of information from NOPSEMA. NOPSEMA's engagement events showed mixed participation, with some stakeholders noting these could be more widely publicised in advance. Stakeholders also valued NOPSEMA's visibility at industry conferences.

Looking ahead, stakeholders emphasised the need for continued community engagement initiatives, with the format of these tailored to suit community preferences (i.e. online, in-person, email etc.).

NOPSEMA Stakeholders rated NOPSEMA **positively**



Interviews

6.6 / 10



Online surveys

6.3 / 10



Small minority expressed stronger criticism; majority held positive views.

Strengths



- Strong stakeholder confidence in NOPSEMA's independence.



- Effective achievement of NOPSEMA's vision and purpose.



- High levels of competence, professionalism, and technical capability.



- Improved engagement with a broader range of stakeholder groups.

Safety and Independence



- Over 80% of online responses indicated medium to high confidence in NOPSEMA.



- Majority agreed NOPSEMA demonstrates independence and fairness.

Comparison to other regulators



- Viewed as more professional, consistent, and effective than most other regulators stakeholders deal with.



- Over 65% of online survey respondents stated NOPSEMA performs better than its regulatory counterparts.

Survey Themes – OIR

In preparing the survey report, the consultants noted that the OIR, as well as the industry that it regulates, is at a vastly different stage of maturity than NOPSEMA. Currently, there are no sites in operation for the OIR to regulate and, as a result, there have been few inspections to date. This was also reflected in a smaller cohort of survey participants. However, responses still provide a useful overview of the early stages of a new regulatory regime. Survey results at a glance are provided in Figure 3, whilst the following sections provide an insight into survey question themes and responses.

Performance and effectiveness

Stakeholder perceptions of the OIR were strongly positive. Interview participants rated its effectiveness at an average of 8.21 out of 10, and online respondents rated at 6.63. Stakeholders cited the strong knowledge of OIR staff and their ability to draw on learnings from NOPSEMA as reasons for confidence, reflected in more than 55 per cent reporting high or very high confidence in the regulator. Regulatory advice and guidance were also rated favourably, although limited inspection activity due to the relative new-ness of the regulatory regime explained why many respondents were unsure about inspection effectiveness.

Stakeholder comments on OIR staff were especially positive, with more than 60 per cent of online respondents describing engagement as effective or very effective, emphasising staff's willingness to meet, share information and provide support. Stakeholders also viewed OIR personnel as proactive and responsive, similar to feedback received about NOPSEMA staff. Overall, the OIR was seen as performing well, supported by capable staff, clear communication and positive early

engagement, with no major safety concerns reported.

Communication/education

Stakeholder feedback on the OIR's communication and education activities closely mirrored views expressed about NOPSEMA. The OIR website was generally well used and well regarded, and stakeholders rated the OIR's guidance and educational materials positively. Many described the guidelines as clear, practical and easy to understand, praising the plain-English explanations and inclusion of examples and diagrams. Workshops and fact sheets were also highlighted as particularly useful tools for supporting compliance. Stakeholders also noted that the offshore energy industry in Australia is still at an early stage compared to other countries, and that regulatory frameworks differ significantly internationally. They suggested the OIR should account for these differences when engaging with stakeholders, especially those familiar with more mature overseas regulatory systems.



OIR performance ratings (0–10 scale)



Stakeholder interviews

8.2 / 10

Average rating

8.21 / 10



Online surveys

6.6 / 10

Average rating

6.63 / 10

Confidence & Engagement



55%+

Stakeholders reporting high or very high confidence in OIR



60%+

Stakeholders rating engagement with OIR staff as effective or very effective

OIR snapshot



OIR formally established 2022



OIR staff described as knowledgeable, proactive and responsive



OIR's regulatory advice and guidance rated strongly and consistently



No major safety incidents reported by stakeholders

NOPSEMA & OIR - Findings and Trends

The data presented in the survey report indicated trends amongst survey respondents, touching on concepts such as reputation, confidence, independence, staff capability, and communication. These trends are explored in further detail below.

Strong Regulatory Performance & Improved Reputation

Stakeholders view NOPSEMA as an effective, high-performing regulator that is largely meeting its functions, vision and purpose. Its performance is consistently rated better than comparable regulators, and there is clear evidence that performance has improved over the past two years, driven by leadership changes, broader engagement and a more pragmatic approach.

High Confidence in Safety, Independence & Fairness

NOPSEMA maintains a strong reputation for safety oversight, independence and fairness. Confidence levels remain medium-to-high across stakeholders, with broad agreement that the organisation is impartial, transparent and procedural fairness is upheld in enforcement actions. Importantly, the changes in approach over the past two years are not seen as compromising safety.

Staff Capability, Culture & Engagement Quality

Stakeholders consistently regard NOPSEMA staff as effective, proactive, responsive and aligned with organisational values. Engagement between staff and external stakeholders is viewed as constructive and reliable, and staff behaviour demonstrates professionalism and technical capability. While some feel NOPSEMA could strengthen its demonstration of values at the organisational level, staff commitment is evident.

Regulatory Burden, Consistency Challenges & System Complexity

Despite strong overall performance, stakeholders experience growing regulatory burden, including increased documentation, longer approval times and rising consultation requirements. Some stakeholders note inconsistency in regulatory interpretation across NOPSEMA personnel, and evolving expectations around ALARP that can create uncertainty. Still, NOPSEMA is seen as regulating proportionately and focusing on the right issues.

Communication Effectiveness & Access to Information

Overall communication volume is seen as appropriate, and stakeholders find NOPSEMA's official channels (website and The Regulator) reliable and well-received. Communication materials and guidance are generally clear, and staff engagement supports effective information flow.

NOPSEMA & OIR – Committed to Continuous Improvement

Building on the strong results of the 2025 Stakeholder Survey, NOPSEMA and the OIR will continue to strengthen our engagement with stakeholders and target areas where trends and feedback indicate there is more to do.

We are committed to listening carefully, acting transparently on what we hear, and embedding continuous improvement across our regulatory functions. By maintaining a clear, consistent and risk-based approach, we will uphold leading regulation of Australia's offshore energy industry while building trust amongst our stakeholders.

Information on how to provide feedback is available online at www.nopsema.gov.au/feedback-and-complaints.