REGIONAL ASSOCIATION OF
OIL, GAS AND BIOFUELS SECTOR COMPANIES
IN LATIN AMERICA AND THE CARIBBEAN

Human Talent Benchmarking Report

September 2017

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BENCHMARKING

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Benchmarking report on Human Talent

The Benchmarking Project on Human Talent is in line with the Committee's mission of developing, sharing and promoting best practices and solutions in terms of attraction, retention, training and development of human talent.
The first edition of the report was released in 2012. It allowed opening spaces for the development of several documents on specific topics addressed by the Committee. This report is intended to give continuity to the initiative undertaken in that year. It aims to provide information to members about different areas of HR management. The report contains a first part concerning quantification, and then addresses context; evolving needs, attraction and recruitment of talent; communication and participation; training and knowledge management; background, retention and long-term commitment; diversity management; working conditions; and compensation plans and recognition.

EXECUTIVE REPORT

Quantification and context

With regard to the demographics of companies that responded to the survey, 73 % have a workforce of less than or equal to 20,000, 64 % a turnover equal to or less than 10,000 million U.S. Dollars; 53 % of companies are present in Latin America or worldwide. Concerning the type of company, state-owned, private or a combination of both, they are divided into thirds. Finally, 73 % work in exploration, and 67 % in production, refining and transportation.

Considering the new challenging context faced by the industry in the context of the sharp decline in oil prices caused by imbalances in the global supply had a great impact on the market and led to oil & gas companies to quickly adjust their operating models, the leaders focused on solving the business requirements through different strategies to reduce costs and improve efficiency.

The area of Human Talent is adapting to support the company in this context, and four actions are basically being taken. In the first place, 87 % are redesigning practices and processes to reduce costs, 73 % are developing clear and transparent communications, and 60 % are promoting an active leadership and reviewing the human resources strategy.

The initiatives being implemented are restructuring in 85 % of cases, and downsizing and restrictions on recruitment of employees and contractors in 64 %.

Evolving talent needs

During the period 2012-2016, companies recruited new employees because the specific resource requirements were defined as a result of the generation of new products or services, the expansion into new markets, etc., and the aim was to strengthen the areas that were most critical to the success of the business.

Organizational areas with the greatest growth in the last three years were exploration, production, supply and refining, and petrochemicals. After these recruitments, staffing increased for 36 % of companies, remained the same size for 43 % of companies, and decreased for the rest of companies.

For the period 2017-2020, 29 % plan to reduce staffing by 1-5 % and 21 % by 5-10 %. On the other hand, 21 % plan to increase staffing by 1-5 %.

Forecasts indicate that demand grows for Engineering, Production and Research, and Development, and is consolidated for Refining and Petrochemicals, Audit / Legal, Marketing and Sales, Customer Service, Safety and Health, and Continuous Improvement.

What best describes the human resources strategy to meet the needs of companies is that they will be structurally reorganized to have a more efficient, less costly and more qualified staffing, and will seek to strengthen the areas that are most critical to the success of the business

A formal competence management model is implemented in 64 % of companies.

The three most critical technical competences to be developed by business area are:

Administrative
Planning and Management , Project Management and HSEQ

Upstream
Management of Well Activities / Drilling and Completion

Downstream
Refining and Petrochemical Processes, and Advanced Control

Commercial Management
Sales (commercial management, marketing and customer support, commercial services-customer experience)

Cross-cutting - Process Safety and Operational Reliability

The need to develop them in the organization is due to the fact that the necessary skills have been changed according to new strategic focuses of the organization (new business / markets), new discoveries and technological advances (new tools and knowledge).
The profiles in which there is a lack of adequate human resources are firstly professional/technical positions, and secondly executive positions.
The shortage of talent in the market and the forthcoming retirement of experienced people will have an impact on management positions with personnel under their supervision in both the upstream and downstream sector, and cross-cutting areas. Those positions with no personnel under their supervision will be affected to a lesser extent in the upstream and downstream sectors, while cross-cutting areas will also be affected at the management and executive level.
Faced with the question about how confident they are in attracting/retaining talent for the most critical areas of their business and for the organizational profiles, in general there is trust in both cases. The percentage of mistrust is low, except at the level of experts which stands at 36 % of the total, but it is also higher than the percentage of trust.
The aspects of higher priority in organizations for the next year are focused on adapting the dimensioning to retain key talent, and on engaging and developing talent.
In all the companies, the Human Resources Director is part of the management team of the organization, which indicates the significance of the topic for them. In 86 % of cases, he/she reports to the CEO of the company and is the main officer in the implementation of Talent Management Programs. The most important role for the HR Director is that of being responsible in the implementation of Talent Management Programs and partner of the business areas analyzing and defining the Talent Management strategy.

The priority issues in the management of the talent needs are: :

- internal talent available to fill key positions
- boosting leadership development programs, and the commitment and participation of employees
- reinforcing the behaviors and the development of the corporate culture
- increasing the efforts to retain critical talent
- corporate social responsibility

With regard to the capacities required for the area to play such a role in the management of talent needs, it was determined that the following were key: leadership and technical knowledge of the business, strategic vision and proactive role with the ability to propose solutions regardless of the classic processes of the function, and new techniques and technological infrastructure for the HR processes.

HR activities on which key indicators are reported are: training and development (85 %), selection (85 %), performance reviews (77 %), and compensation and benefits (77 %), termination management (62 %), and workforce planning and succession planning (46 %). Participation in external benchmarking on compensation and benefits packages was 86 %, and on training and development, 50 %.

Key Performance Indicators (KPIs)

The average annual voluntary turnover as (%) of the workforce in the last financial year was 3 %, with a minimum of 0.6 % and a maximum of 6 %. The involuntary turnover was 7.2 % with a minimum of 0.26 % and a maximum of 30 %. This reflects the policies promoted by companies to reduce staff and give incentives for voluntary retirement considering the current situation of the industry regarding restructuring and cost reduction.
As regards highly qualified professionals turnover, 54 % replied that it is not significantly different from the rest of the workforce, while 23 % said that it is, and 23 % stated that they have no information.
The average absenteeism rate was 2.7 %, with a minimum of 2 % and a maximum of 4.3 %. Of the total number of companies that responded to the survey, 43 % do not have information on the average absenteeism rate.
The current average percentage of women in the workforce amounts to 20 % with a minimum of 12 % and a maximum of 40 %. The average percentage expected in a period of three years is 20.6 %, with a minimum of 13 % and a maximum of 50 % for 50 % of companies, because the other 50 % does not have estimates in this regard.
On average, 72 % of key management/executive positions are filled by internal candidates (succession), but the range is from 8 % to 98 %. If the two lower percentage rates are not considered (8 % and 25 %), the percentage increases to 86 %.
Women hold 12 % of the (50) main management positions in the organization (board of directors/ executive directorate). The range is from 1 % to 40 %.
On average, 80 % of the total staff participated in training programs. As regards mentoring, only five companies reported programs, and the average percentage is 4 %. Only seven companies reported coaching, and the average percentage is 8 %. This shows that training is the program most used by companies with a high level of participation of the workforce.

ATTRACTION & RECRUITMENT | COMMUNICATION AND PARTICIPATION

In the vision of the companies that completed the survey, the evolution of the current context directs the Human Resources strategy to accompany the challenges faced by the business, streamlining the talent management strategy. A review of practices and initiatives marked with greater flexibility and agility to those required in more favorable contexts was identified.
As regards **Attraction and Recruitment,** a conservative while looking-forward trend is perceived. A global hiring freeze has not been implemented, while the actions of staff recruitment are identified, mostly backed by three variables:

- loss of valuable talent - and their subsequent replacement
- need for capturing knowledge and specific skills form the market - mostly promoted by the development of new businesses, services or markets
- capturing talent for different capabilities that can be envisaged in the future

That is to say, the organizations have not identified clearly the drivers to stimulate recruitment of new personnel -within a restrictive context.
With regard to the trust concerning attraction and retention, 64 % considered that they are very well prepared and 29 % considered that they are well prepared. This would indicate that the rate of trust to attract and retain key personnel is high even for areas considered critical.
The “rate of trust” is also high with respect to the capacity to attract profiles, especially when considering the segment of generalist profiles, in contrast to the responses at the level of experts.
With regard to how well prepared is the role of recruitment to handle the needs of talent, 95 % of respondents are considered to be between very well and well prepared. In terms of attraction and recruitment, one of the prevailing strategies is to recruit (86 %) and train young professionals with high potential for learning and performance from scratch. Following is the strategy to be directly associated with external educational centers (universities, business schools, etc.) to identify potential

candidates (79 %).
For candidates under the age of 30, the most valued elements at the time of making the decision to accept a job are: career development, compensation, and work-personal life balance.
When the question challenges us to look to the future to identify priorities for the next year, the variables on the agenda depend on balancing the effort of dimensioning underway in the industry with the focus on not losing key talent: developing it and committing it.
As regards attraction, an emerging work associated with the employee value proposition is perceived where the industry has today a space to capitalize with respect to its strategic definition, its implementation and management (36 % of respondents do not implement actions of this nature). In this regard, initiatives observed are mostly marked by some attributes such as benefits and career development options.

With reference to channels of **Communication and Participation** available to the employees of the companies that responded to the survey, the most significant are formal face-to-face meetings between employees and directors (71.4 %). Following, in order of importance, are structured surveys and suggestion boxes (64.3 %). Undoubtedly, a space of opportunity is to work in new communication strategies which consider new generations and expand the possibilities of partnership and collaboration. At the time of focusing on the transmission of values, mission and vision, the prevailing trend is reversed: the media instead of face-to-face communication (e-mail or newsletters).
The contact within the organization is encouraged through on-line chat (79 %), and to a lesser extent through social networks (57 %).
As a summary of Attraction, Recruitment, Communication and Participation issues, it could be concluded that the change in the context is creating opportunities in terms of integral talent management to rethink ideas, initiatives and practices and perhaps rethink HR management within the industry.

Training

The most used learning methods to meet the technical training needs include **specific training programs for a position, forums/conventions/ congresses** and, to a lesser extent, formal training in universities, business schools, institutions of the Industry, and general and individually selected training programs. This shows that they follow very traditional processes even for this purpose.
The development practices usually considered are leadership development programs and job rotation programs, which have been traditional practices in the industry for quite some time.
The effectiveness of training programs continues to be measured in 93 % of cases through the evaluation made by the participants. However, it is noted that there is a growing percentage of companies that are doing so through the development of knowledge or skills.

Background, retention and long-term commitment

Most widely used retention practices are monitoring systems for development plans and the identification/ monitoring of top performers.
Performance evaluations are a tool used at all levels of the organization; they are documented for all employees, future performance is planned and professional development plans are discussed.
Only 57 % have identified the key positions that contribute to the strategy. The same percentage stated that they have identified the key people to be retained. This gives an idea of the greater use that could be made of the guidelines developed by ARPEL for this purpose.
Only 50 % work formally and proactively to assign key people to key positions that contribute to the strategy.
There are no succession or replacement plans in 21 % of respondents; only 36 % have a plan for all management and specialist positions.
In the vast majority of them (64 %), career aspirations are the most important reason for resignation.

Diversity and working conditions

Only 50 % of companies consider diversity as a key strategic priority of Human Resources; 100 % of this percentage takes gender issues into account, only 60 % consider age-related issues, and half of them consider the issue of different abilities.

There is not a great number of flexible work plans, 57 % have special parental leave, and 43 % flexible work schedule and telework. The latter is applied for executives, managers and professionals.

The vast majority of companies (93 %) have an important coverage of welfare schemes that include physician in the office in charge of health and prevention of risks, and to a lesser extent (64 %) maintenance of contractual rights of employees beyond legal obligations.

In 92 % of cases, companies offer a bonus based on individual results, and in 75 % based on organizational performance. Salary increases are based on inflation and individual performance. Good workers in terms of recognition and compensation are differentiated by salary increase, performance awards, special bonuses and other incentives.

STATISTICAL SUMMARY

QUANTIFICATION

73%
has a staffing up to 20.000 employees

64%
a gross income up to 10 billion US$

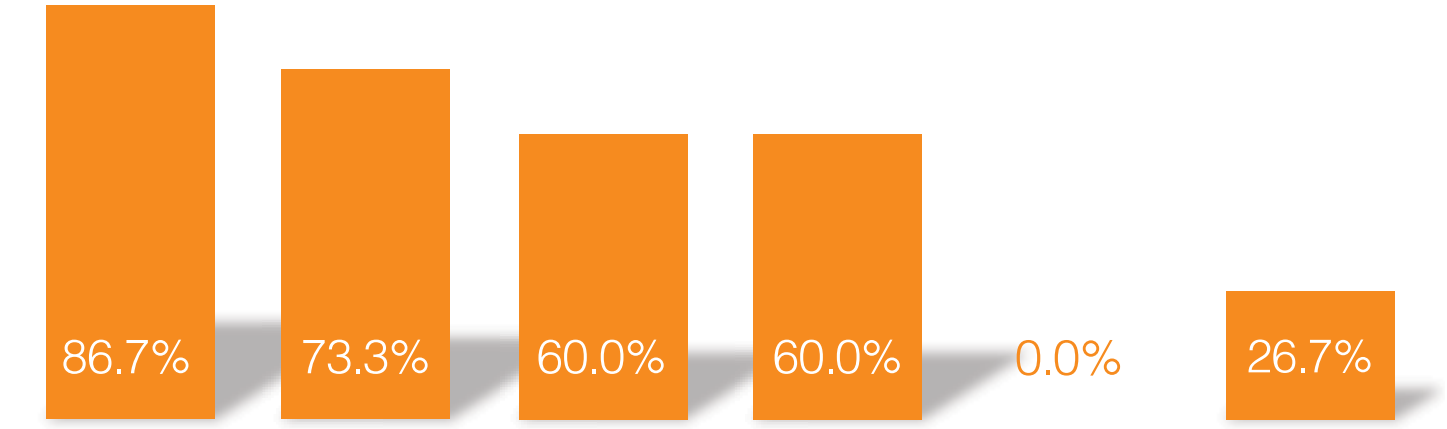
53%
has activities in Latin America or globally They are divided into thirds as refers state, private or mixed property

73%
is in exploration, 80% in commercialization

67%
in production, refining and transport.

CONTEXT

How is Human Resources adapting to support the company?



How is Human Resources adapting to support the company?

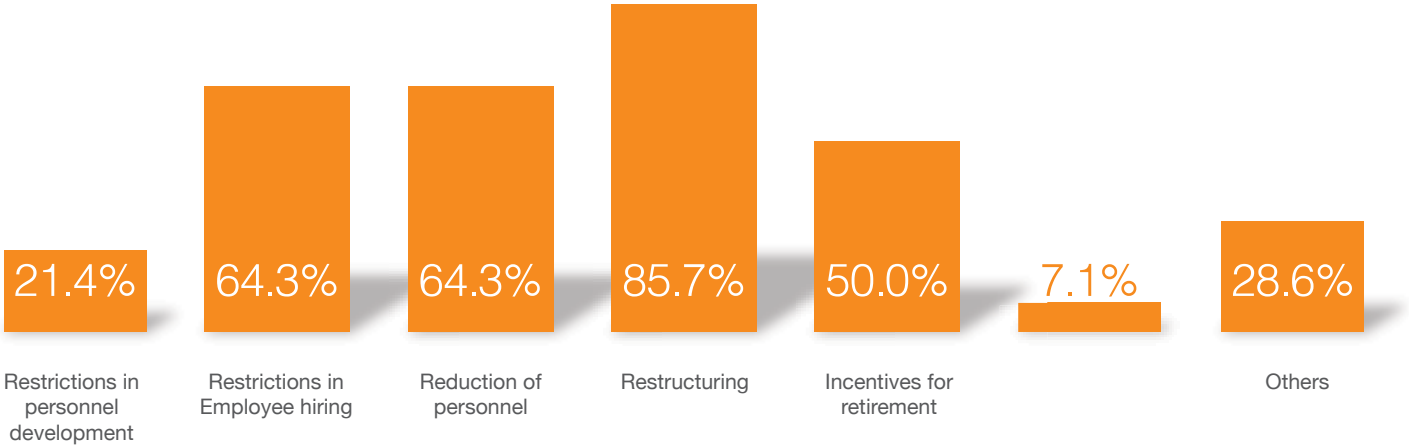
Redesign of practices and processes to reduce costs

87%

73%

Clear and transparent communication with employees

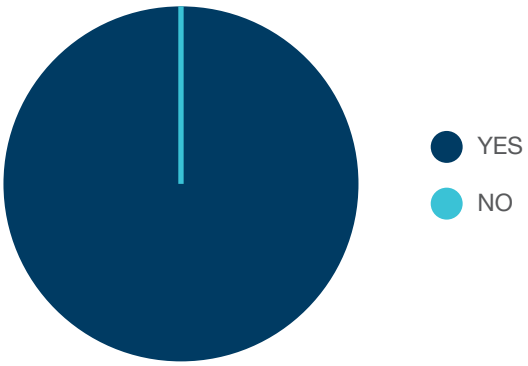
Which Human Resources initiatives are being implemented at present?



Which Human Resources initiatives are being implemented at present?

EVOLVING TALENT NEEDS

Has your company recruited new permanent employees during the last 3 years (2012-2015)?



Which of the following reasons do better explain the need of a growing infrastructure during the last 3 years?

- Specific needs of human resources were defined due to the development of new products or services, the expansion to new markets, etc.
- We wanted to strengthen the more critical areas for business success

Which are the 3 organizational areas of major growth in the last 3 years?

- Production
- Exploration
- Supplying
- Refining and Petrochemicals

After these incorporations, which is the present dimension of your organization compared with your size 3 years ago?

Which of the following scenarios do better describe the sizing strategy of your staff during the next 3 years (2017-2020)?

Which of the following scenarios do better describe the sizing strategy of your staff during the next 3 years (2017-2020)?

29%

We plan to reduce our staff in 1- 5%

21%

We plan to reduce our staff between 5% -10%

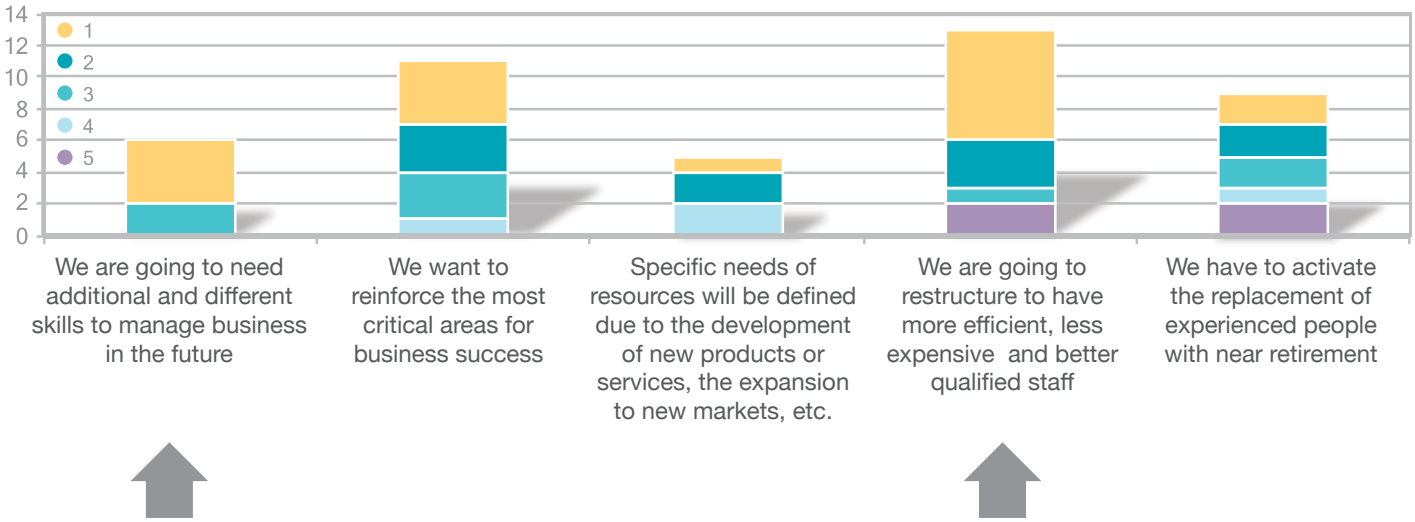
21%

We plan to expand our organization in 1- 5%

Which are the demand forecasts for the next 3 years?

- Engineering, Production and Research & Development **grow**
- Refining & Petrochemicals, Auditing/legal, Marketing and Sales, Client Services, Health & Safety and Continuous Improvement **consolidate**

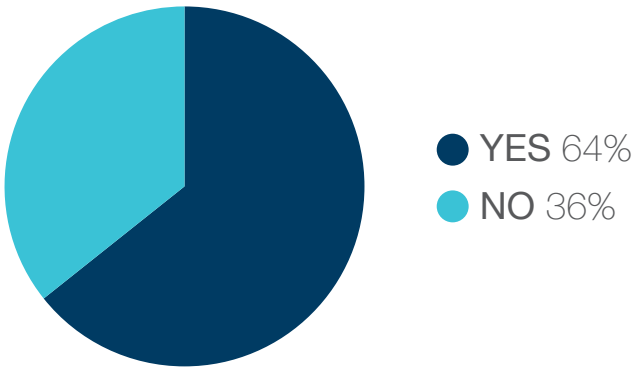
What does it better describe your human resources strategy to satisfy the needs of your company?



What does it better describe your human resources strategy to satisfy the needs of your company?

- We are going to restructure to have more efficient, less expensive and better qualified staff
- We want to reinforce the most critical areas for business success

Does your company have a formal model of management by competencies implanted ?



Indicate which are the 3 technical competencies more critical to develop for each of the following aspects of your business

Administration: Planning and Management, Projects Management and y HSEQ

Upstream: Management of well activities/ Drilling and Completion

Downstream: Refining and petrochemical processes and Advanced Control

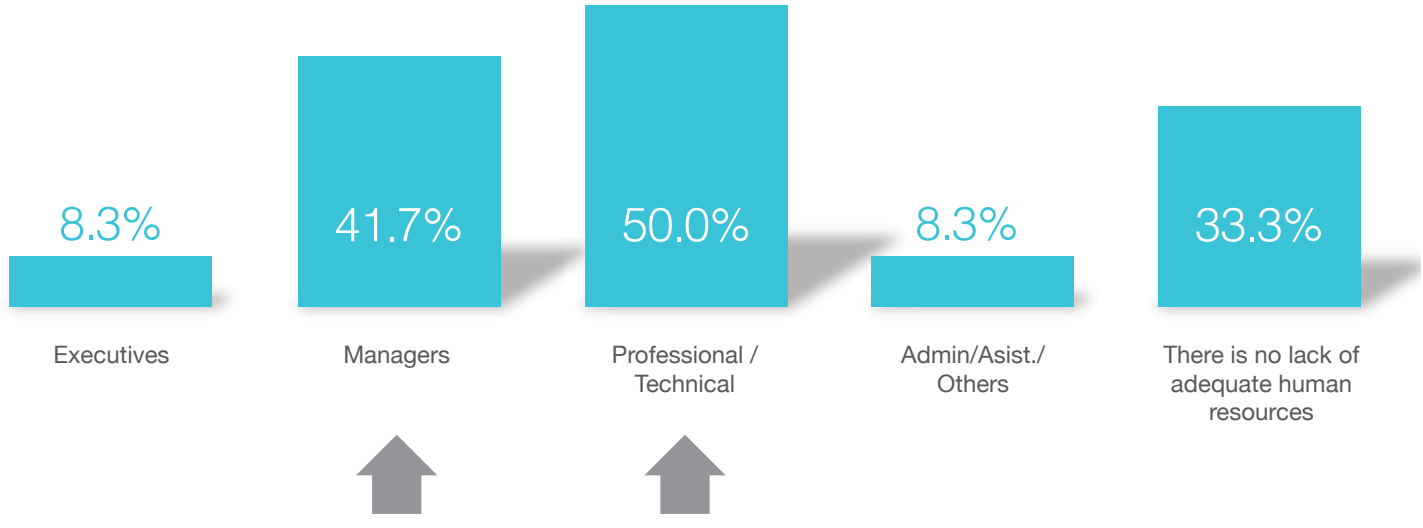
Commercial Management: Sales (Commercial management – Commercialization and support to clients), Commercial Attention – client experience

Cross cutting issues – Process Safety and Operational reliability

Considering the critical competencies you previously chose, which statements do you consider better describe the need to develop them in your organization?

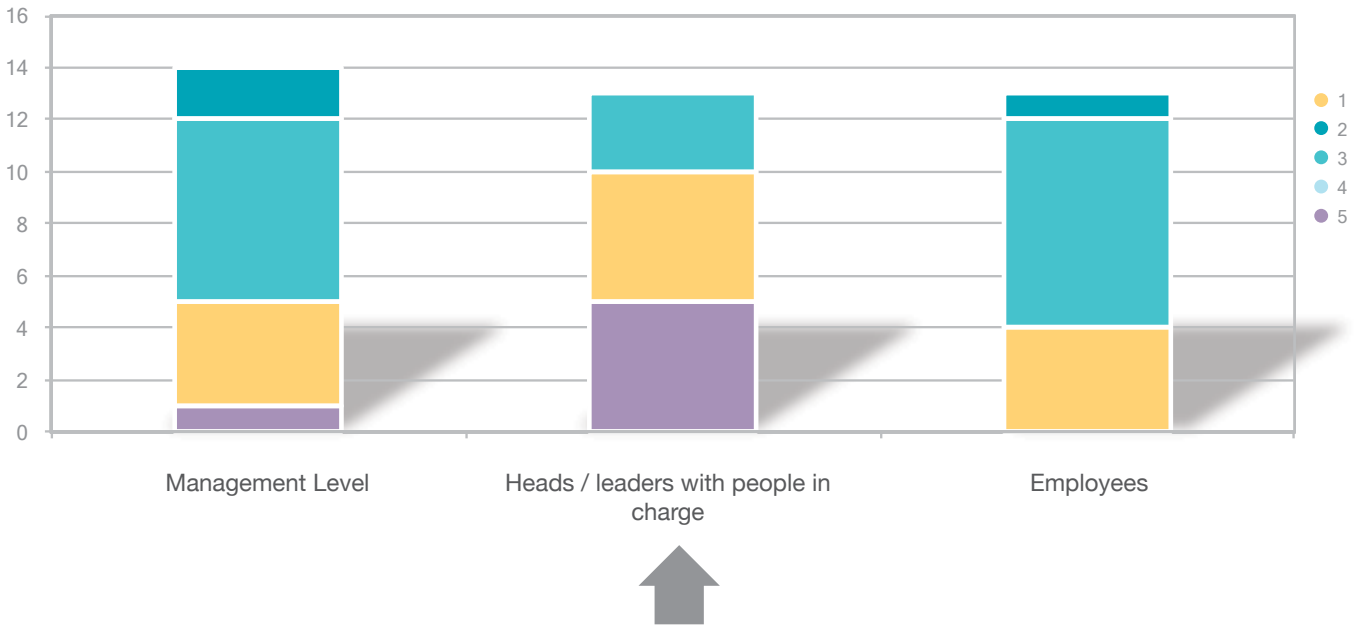
- The needed competencies have changed according to new strategic focus of the organization (new business /markets)
- The needed competencies have changed according to new discoveries and technological advances (new tools and knowledge)

In which category does it exist a lack of adequate human resources?



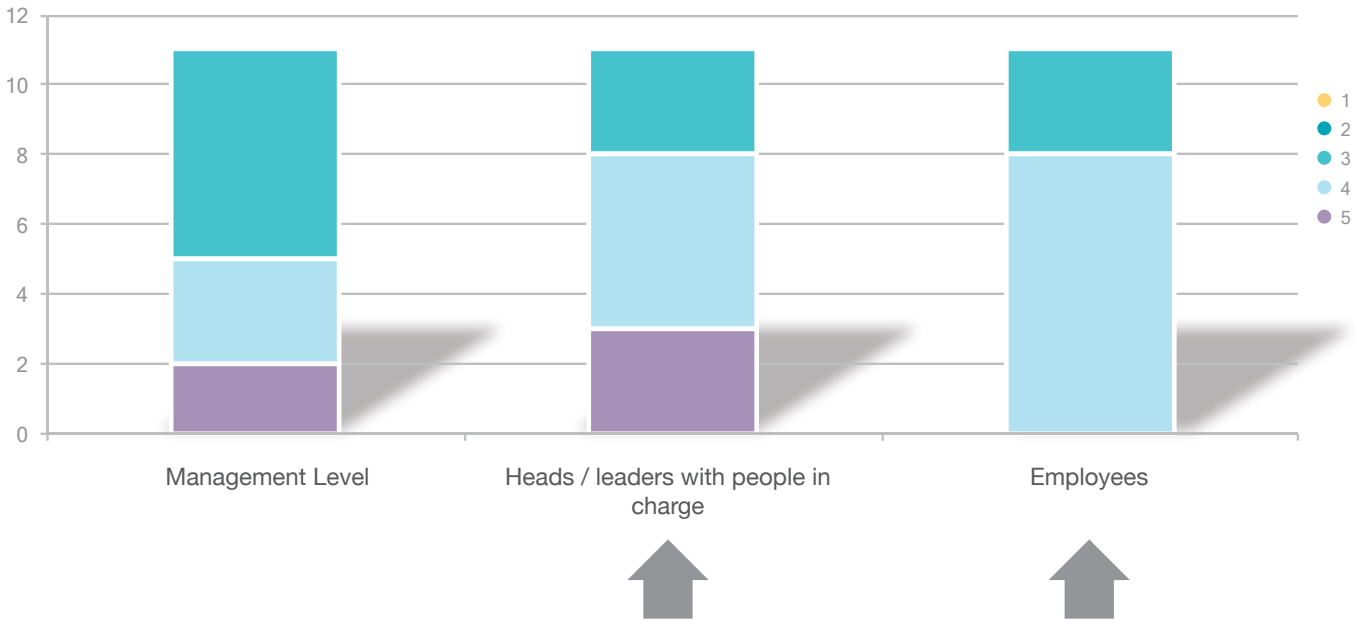
Which impact do you think the shortage of talent in the market and the near retirement of experienced personnel has for each of the following organization levels? UPSTREAM

1 means NO IMPACTED - 5 means HIGHLY IMPACTED



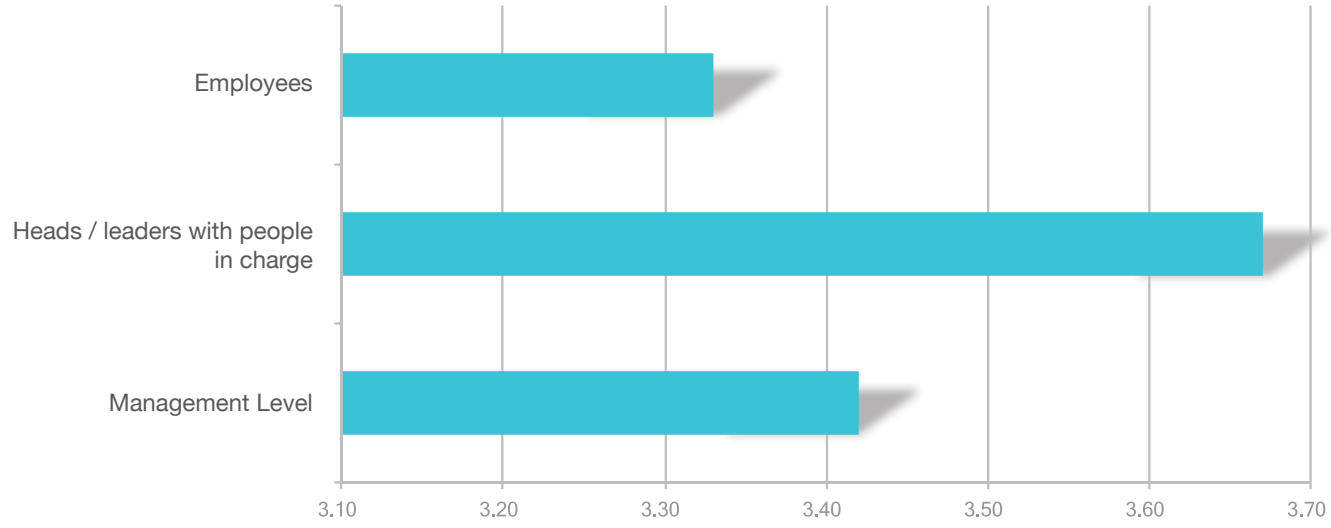
Which impact do you think the shortage of talent in the market and the near retirement of experienced personnel has for each of the following organization levels? DOWNSTREAM

1 means NO IMPACTED - 5 means HIGHLY IMPACTED



Which impact do you think the shortage of talent in the market and the near retirement of experienced personnel has for each of the following organization levels? Cross-cutting issues

1 means NO IMPACTED - 5 means HIGHLY IMPACTED



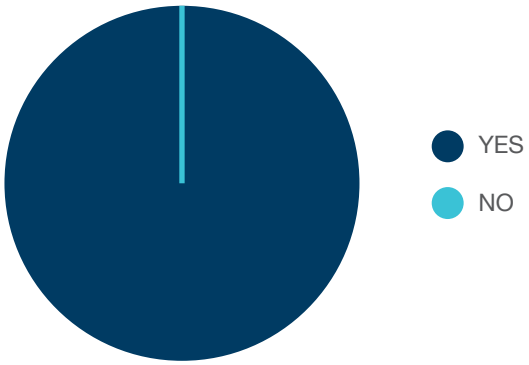
How confident are you in attracting /retaining for the most critical areas of your business and in the different levels of your organization?

- In general confidence predominates in both.
- The percentages of distrust are low, except at expert level (36%) but in general the percentage of confidence is higher

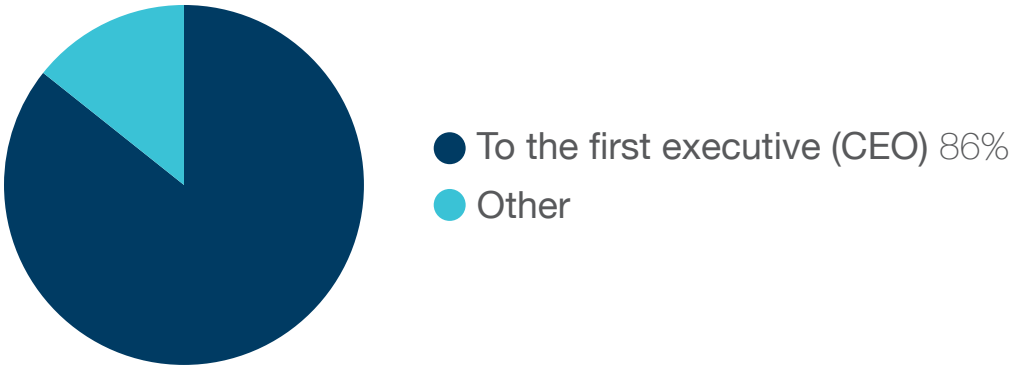
Which of the following aspects has higher priority in your organization for the next year?

- Adapt the sizing, retaining key talent
- Engage and develop talent

Does the Human Resources Director participate in the Management Team of the organization?



To whom does the Human Resources Director report directly?



Which role does the Human Resources area has in the management of talent needs?

Main responsible in the implementation of Talent Management Programs

Which role do you think must the Human Resources area have in the management of talent needs?

- Main responsible in the implementation of Talent Management Programs
- Partner of business areas, analyzing and defining talent management strategy

Which are the priority focuses in the management of talent needs?

- Focus in internal talent available to fill key positions
- Foster programs of leadership development
- Foster the commitment and participation of employees. Strengthening of behavior and development of corporate culture.
- Increase the efforts to retain critical talent
- Corporate Social Responsibility

Which are the capacities that you believe the Human Resources area needs to develop to have that role in the management of talent needs?

- Leadership – Technical knowledge of the business
- Strategic Vision – Proactive role with capacity to propose solutions independently of the classic processes of the function
- New techniques and technological infrastructure for human resources processes

For which activities do you report key indicators?

Training and development 85%

Selection 85%

Review of performance 77%

Compensation and benefits 77%

Management of leaving 62%

Personnel planning and succession planning 46%

In which external human resources benchmark has your organization participated in the last 12 months?

- Compensation and benefits packages 86%
- Training and development 50%

KEY PERFORMANCE INDICATORS (KPIS)

Which was the annual staff turnover (voluntary + involuntary) in the last fiscal term?

- Voluntary: average 3% (Minimum 0.6 – Maximum 6.00)
- Involuntary 7.2% (Minimum 0.26 – Maximum 30.00)

Which is the average time off rate in the organization per year?

- 2.7% (Minimum 2 – Maximum 4.3)
- Several companies do not measure or did not respond

Which is the present percentage of women in the staff and which percentage do you foresee in three years?

- Present percentage 20% (Minimum12 – Maximum 27)
- Next 3 years 20.6% (Minimum 13 – Maximum 50)

Which % of management/executives positions are covered with internal candidates (succession) ?

- 72% (Minimum 8 – Maximum 98)
- The % goes to 86 if the two minimum responses are thrown out

What % of the (50) main management positions of the organization (board of directors, executives board) is occupied by women?

12% (Minimum 1 – Maximum 40)

What % of the total staff participated in the following programs during last year?

Mentoring – Only 5 companies reported programs and the average is 4%

Training – 80%

Coaching – Only 7 companies reported to have programs and the average is 8%

ATTRACTION & RECRUITMENT

How well prepared do you think is the recruiting area in your organization to manage the shortage of talent in the market and the next retirement of experimented professionals?

- 64% considers it is very well prepared
- 29% considers it is well prepared

Which are the measures your organization has implemented to recruit professionals with critical competencies?

Recruit and train "right from the start" professionals with high potential of learning and performance 86%

Associating directly with external educational centers (Universities, Business Schools, etc.) to identify potential candidates 79%

How do you evaluate the effectiveness of the following sources of recruiting? The better evaluated have been

- Active labor market of the same industry/ competitors
- Universities / Business Schools

Which are the elements most valued by candidates when taking the decision to accept a position? Age less than 30 years

- Career development
- Economic compensation
- Work – personal life balance

What actions does your organization adopt in relation to the value proposition to employees?

- A formal declaration on the offers of the organization to employees (rewards, benefits, personal development, etc.) 57%
- There are no actions concerning with that 36%
- Identification and specific employee segmentation in relation with the needs /desires of employees and offers of the organization 21%
- Measurement of the suitability among the needs/ employees desires and the organization offers (at least every three years) 21%

COMMUNICATION AND PARTICIPATION

Which communication channels can employees use to give their opinion on organizational aspects ?

- **Employee surveys** 64,3%
- **Box/email suggestions** 64,3%
- Structures of participation (for ex. company committees) 42,9%
- **Formal sessions** (for ex. meetings between employee and director) 71,4%
- Special events (networking, teambuilding, working breakfast) 50,0%
- Fora/blogs in the Intranet 35,7%
- Special access to CEO/Leadership 28,6%
- Instant messaging 28,6%
- Social communication media 35,7%
- Brainstorming sessions 28,6%
- Other 14,3%

Through which channels do you communicate the mission, vision and values of the organization to the employees?

- E-mail, newsletter 100%
- Messages through the intranet 93%
- Company meetings and personnel meetings 57 %

TRAINING

Which training methods do you utilize to cover the technical training needs?

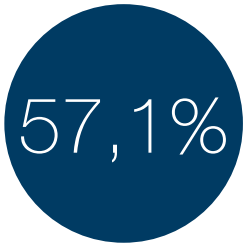
- **Specific training programs for a position /area** 85,7%
- **Fora / Conventions / Congresses** 78,6%
- Formal training in Universities, Business Schools, Industry institutions 71,4%
- General training programs 71,4%
- Individually selected training programs 71,4%
- Programs / Training for development of graduates 57,1%
- In company practices 57,1%
- Distance learning 42,9%
- Ad hoc workshops of retired industry experts 21,4%

Which development practices do you consider more usually?

- Programs of leadership development 76,9%
- Programs of employment rotation 53,8%
- Programs of talent management / top performers 46,2%
- Programs of coaching/mentoring 46,2%
- Programs of help among colleagues 15,4%
- Other 15,4%
- International Interchange Programs 7.7 %

How does your organization measure the effectiveness of the training programs?

Evaluation made by participants



Development of knowledge or capacities

BACKGROUND, RETENTION AND LONG TERM COMMITMENT

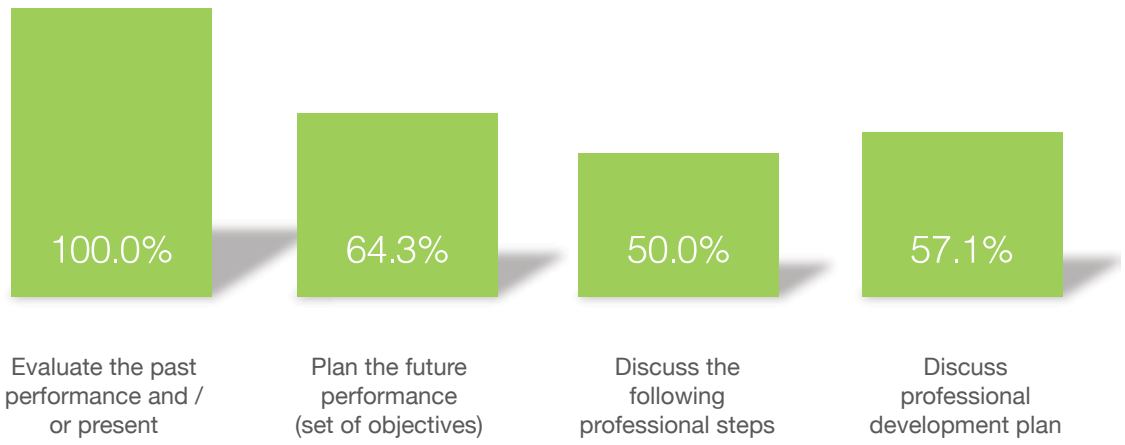
Which retention practices do they exist in your organization?

- Follow up of development plans 64,3%
- Identification/monitoring of top performers 57,1%
- Events for staff motivation (for ex. parties, exercises of team construction) 50,0%
- Recognition/seniority awards 42,9%
- Long term incentives 42,9%

For which positions does your organization have performance evaluation?

- Professional level 100%
- Assistance, administration and rest of the staff 100 %
- Management level 92,9%
- Executive level 71,4%

How often are the following aspects reviewed and documented formally for the employees? (per year)?



Has your organization identified the key positions that contribute to business strategy?

- Yes, these positions are formally defined and differentiated 57%
- Yes, these positions have been reviewed and updated according to future strategic objectives of the organization 50%

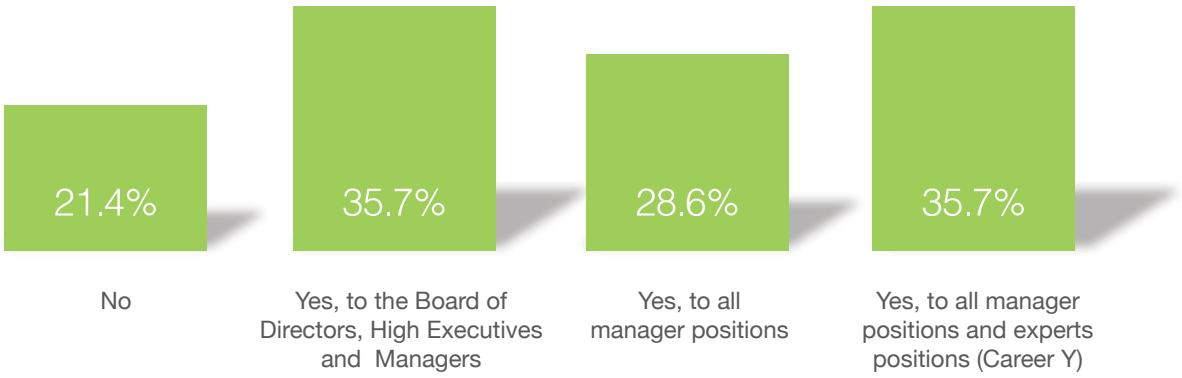
Has your organization identified the key persons to be retained?

- Yes, they have been identified as key for their development potential and career 57%
- Yes, they have been identified as key because they have a high level of knowledge and critical competencies 57%

Does your organization work formally and proactively to assign the key personnel in key positions of contribution?

- Yes, in this work participate the High Management and Human Resources jointly 50%
- Yes, individualized work is developed to have the key positions covered with key people to be retained 43%
- Yes, we have identified the future successors of present critical positions 43%

Has your organization succession and replacement plans? To whom are they addressed to?



Which of the following aspects of succession planning are centrally coordinated in your organization?

- Training, to prepare the suitable employees 71%
- Periodical review of senior positions to identify successors 57%
- Managers denominate successor before being promoted 50%

Indicate in which extent the following reasons for resignation are applicable in your organization

Professional ambitions 64,3%

DIVERSITY MANAGEMENT

Is diversity considered or has it been considered and managed as a key strategic priority of Human Resources?

Has your organization positions/support department (not at management level) that have diversity as one of their work responsibilities?

- Yes 43%
- No 57%

Which aspects of diversity are covered in the initiatives of the organization and are informed periodically to the executive management?

Gender 100%

Age 60%

Different capacities 50%

WORKING CONDITIONS

Which flexible work plans does your organization offer to employees?

- Special permission for parents 57%
- Flexible work schedule 43%
- Tele work/work from home 43%

In which levels does the organization have facilities for work from home /tele work?

- Executives 57%
- Managers 50%
- Professionals 43%

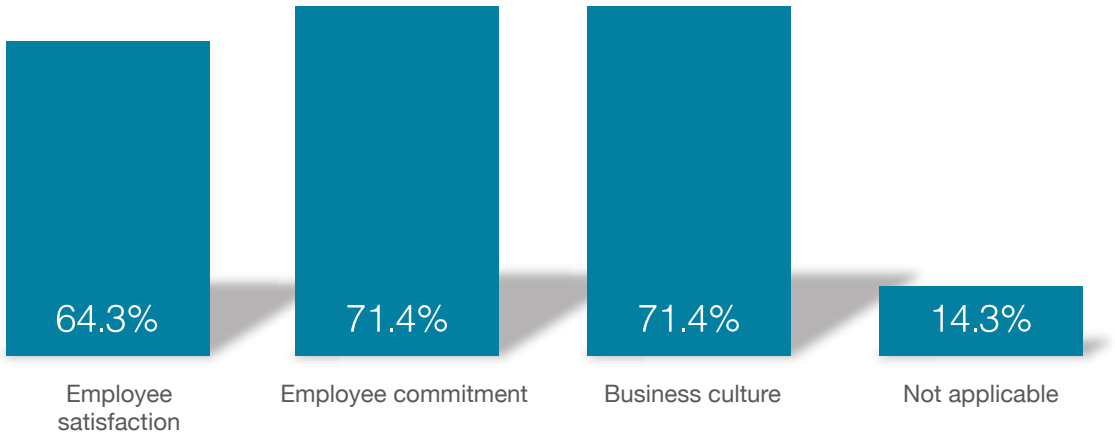
Which welfare programs does your organization offer to employees?

- Doctor at the office 93%
- Person in charge of health and risks prevention 78,6%
- Contractual rights of employees above legal obligations 64%

Which of the following elements does your organization offer to foster the contact within the organization?

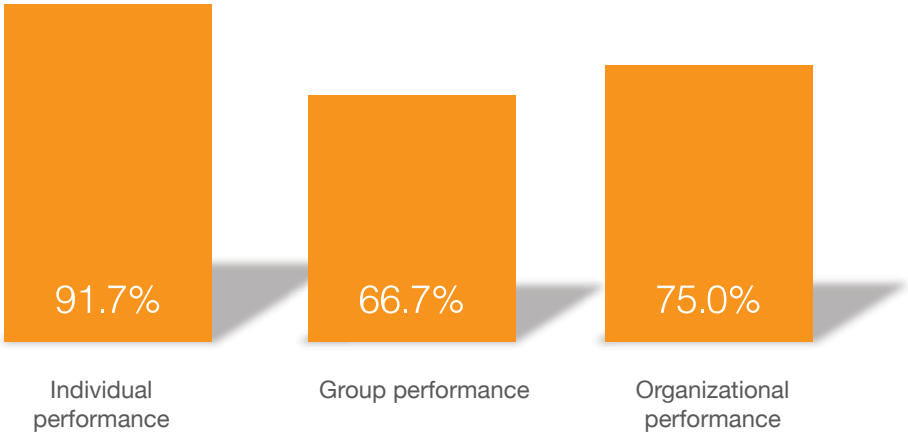
- Chat online/instant messaging 79%
- Online profiles/social network 57%

Which actions are adopted in relation with the satisfaction, commitment and business culture of the employees?



REMUNERATION AND RECOGNITION

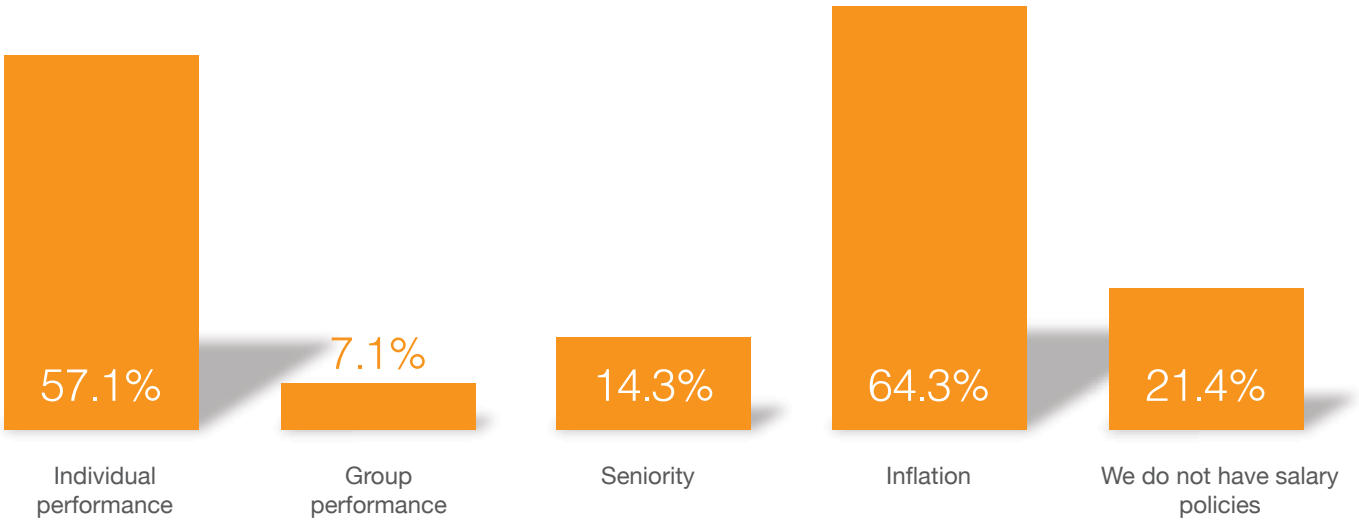
Does your company offer an annual bonus based in individual /group / business results?



Please specify the total percentage of remuneration that an employee can receive for his annual bonuses (including individual, group and organizational)

- Executives 89%
- Managers 89%
- Professionals 100%
- Admin/Assist./Other 89%

Does it exist an annual salary increase based on?



How does your company differentiate the good workers in terms of recognition and compensation?

Salary increase 57%

Performance awards 50%

Special bonus or other incentives 50%

BENCHMARKING

Human Talent Benchmarking Report

REGIONAL ASSOCIATION OF
OIL, GAS AND BIOFUELS SECTOR COMPANIES
IN LATIN AMERICA AND THE CARIBBEAN

ARPEL is a non-profit association gathering oil, gas and biofuels sector companies and institutions in Latin America and the Caribbean. Founded in 1965 as a vehicle of cooperation and reciprocal assistance among sector companies, its main purpose is to actively contribute to industry integration and competitive growth, and to sustainable energy development in the region. Its membership currently represents over 90% of the upstream and downstream activities in the region and includes national, international and independent operating companies, providers of technology, goods and services for the value chain, and national and international sector institutions.

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