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ARPEL  
**Leadership**  
Program

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## ARPEL Leadership Program

The world is transitioning to a new energy future – one where major questions exist about how to position for the future. As a result, energy and oil and gas companies in particular need to understand a more complex and interconnected set of problems which range from—what the future energy mix should be; what effect will decarbonization have; what is the proper mix of upstream assets – conventional, unconventional, offshore and EOR; and what is the value proposition energy companies bring to communities or the license to operate in increasing sensitive areas. As a result of the onset of digitalization, more powerful computers and automation, industry has massive amounts of data to shift through. To be successful then, a new level of understanding and skills are needed.



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## Objectives

Leaders and rising new leaders will get a wide vision of the future of the industry, the major questions arising from the possible scenarios, and the factors and skills that will be needed to solve the problems to navigate successfully to the future.

More specifically the program will provide:

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Tools for developing strategies for the future and understanding of the factors and actors affecting them.

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Skills in decision making which include best practices.

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A common understanding of the regional problems and understanding of the options and pros and cons of each.

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A network of the next generation of globally responsible leaders, who have a common base of the region and the industry challenges.



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# Participant profile

Participants are current senior leaders and the next generation of senior leadership. They share common skills such as strong analytical and communication abilities, as well as a willingness to engage in debate and challenge old dogma. They should be able to devote two full focused days per module.

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# Learning format

The program will challenge participants utilizing a combination of lectures, case studies, and interactive sessions with regional / local experts. The material is designed to both provoke dialogue and critical thinking. The course content is divided into a series of modules focused on three core areas:

1.

Global industry major themes and their importance to the strategies and visions of companies in Latin American and the Caribbean. Upstream challenges & development.

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2.

The role of downstream in the region under the new global context: to build or to buy? Consumption patterns, new generations, urban mobility. Globally responsible leadership.

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3.

Gas and renewables, and their role as power fuels in an increasingly decarbonized world. Energy transitions. Innovation, technology and key disruptors.

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# Modules for the Leadership Program



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## Module 1:

### **Global Factors and their effect on the Latin American Upstream Sector**

**Global and regional energy industry trends:** the global picture and key trends which are driving the industry and how they will influence Latin America and the Caribbean.

**Global factors and actors:** what will the future of the energy business look like; energy transition and the future energy mix; energy demand: what role does the economy play vs. other factors; future oil supply outlooks and disruptors; trends in geopolitics and globalization; trends in analysis and role of digitalization.

**Business models:** the industry has been going through some fundamental changes; the operating environment has also changed with more information and more ways to harness the information. Leadership skills to tackle today's problems have changed.

**Latin America overview:** opportunities in Latin America and how do they relate to the global themes. Latin America economic outlook and political trends; Latin America supply outlook and outlook on unconventional, conventional, offshore and EOR; what are the key regional upstream trends; Ultra-deep water production and the pre-sal. What role will de-carbonization play in Latin America? License to operate.

**Organization of the future:** the new normal will require new models for organizations and new capabilities—innovation, analytical skills, organizational agility, and new potential technologies.



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## Module 2:

# Downstream Sector, the new normal Refining's role in a world of changing demand

**Global and regional downstream industry trends in market and fuels:** global context for developments, potential disruptions and large key questions in the refining industry and how Latin markets are influenced by these larger trends in market and fuels trends.

**Global refining in a scenario context:** what will the future of the refined product demand, crude supply and refining business look like; global refined product demand trends and drivers; globalization of refining, increasing product trade; potential disruptors to demand; refining margins and light / heavy oil outlook and uncertainties.

**The existential threat of EVs, autonomous cars:** Further examination of this topic and how markets in Latin America might develop different than other markets is important to downstream strategy.

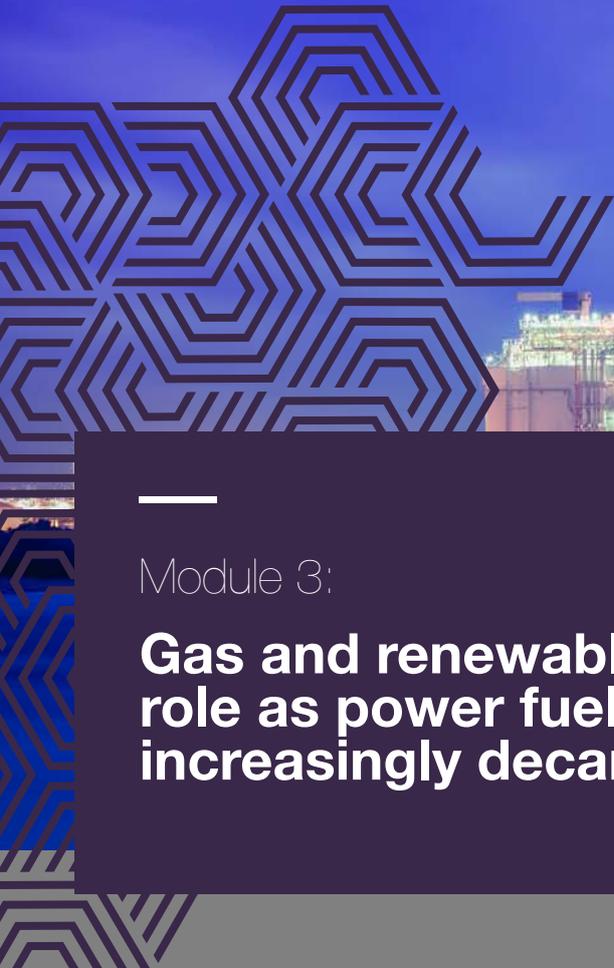
**Reinventing the wheel – oil and refining:** how technology and policy are converging to drive change; the multi-dimensional space of mobility (EV, autonomous and ride sharing); why the self-driving car is the true disruptor; autos sales and climate policies.

**The US Gulf Coast - Latin America Reliance and Competition:** review of refining assets and operations; competitive operations – keys to success; competitive cost of supply to Latin markets, import and domestic; barriers to entry and new market entrants; considering how market price deregulation is influencing competitiveness.

**Latin refining performance, paths to improvements, need for competitiveness and new capacity:** potential disruptions and key questions in the refining industry and how Latin markets are influenced by these larger trends in market and fuels trends.

**Downstream strategies and industry models:** the downstream industry structure has evolved in important ways with evident key trends. Considering lessons from these structural changes in Latin America and other regions is important for industry leaders.

**Evolving industry:** global refining and marketing portfolios; rise of the “international” NOCs and decline of IOCs (global trading arms – less than successful); new market entrants; rationale for portfolio reallocations; outlook for refining industry ownership.



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Module 3:

## Gas and renewables and their role as power fuels in an increasingly decarbonized world:

recap of the global picture and the key trends highlighting renewable energy; technology and its potential to disrupt an energy path; the gas sector and how the various fuels both compete and complement each other to varying degrees at different times especially in Latin America. Participants will understand what structural changes will likely accompany its evolution, what risks it poses, and what strategies different players will pursue in this environment. They will also go through some scenario exercises to fully understand what the driving forces and major uncertainties are in the region—highlighting the technological factors reviewed the day before to support business strategies and thinking.

**Renewable energy and the energy markets. Where are we today and where could we be going?** How and where are renewables growing most rapidly? Renewable energy and Scenarios. Policy and support mechanisms overview. What are the hidden costs? What is holding back the market from expanding further? How competitive will green technologies be compared to conventional alternatives?

**Innovation and Technology:** Is there a game changer on the horizon? Lessons from reinventing the wheel. Are EVs and autonomous vehicles game changers as transportation shifts from oil to electricity? How do smart grids, battery storage, and distributed generation change the equation? Can renewables continue to grow without another breakthrough?

**Natural Gas:** Bridge fuel or a key contributor? Scenarios and global gas markets. What are the key signposts for the gas industry as we look out over the next 20 years? From rigid and regional to local and flexible. Natural gas' unique attributes and why they are essential for future power grids.

The program seeks for being distinctive for the sector. Interaction and active participation of participants are key aspects, together with the level of facilitators and the program content that cannot be found in regular courses.

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## Venues

### 1st Module

**Rio de Janeiro** and Technical Visit to be determined (PETROBRAS)

May, 8-10, 2019

### 2nd Module

**Cartagena** and Technical Visit to Refinería de Cartagena (ECOPETROL)

August, 28-30, 2019

### 3rd Module

**Monterrey** and Technical Visit to Gas Plant and Renewable Energy Project (PEMEX)

October, 22-24, 2019

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## Language

English - Simultaneous interpretation will be available

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For more information please contact

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