

26th World Gas Conference

1 – 5 June 2015, Paris, France



Battle for talents
New Captains, new Seas ©

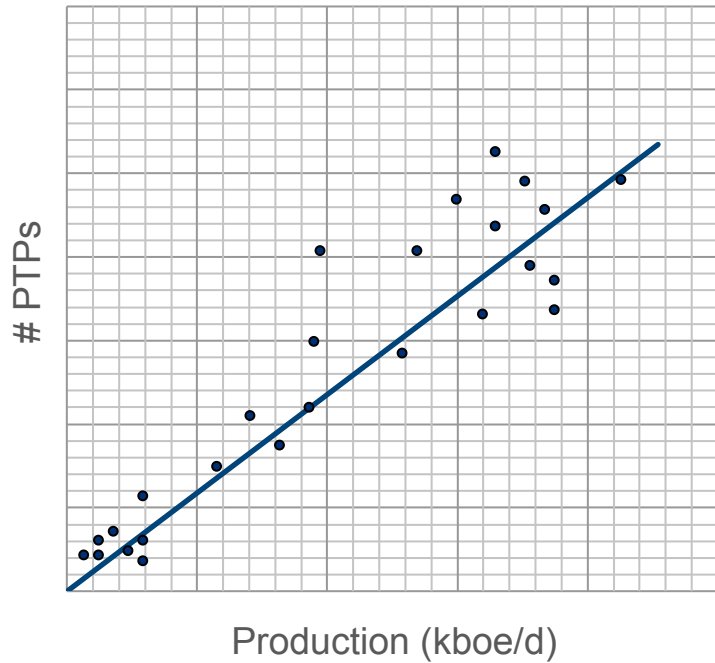
Antoine Rostand
Managing Director, SBC



Long term needs for technical staff remain strong

PTP¹⁾ VS PRODUCTION

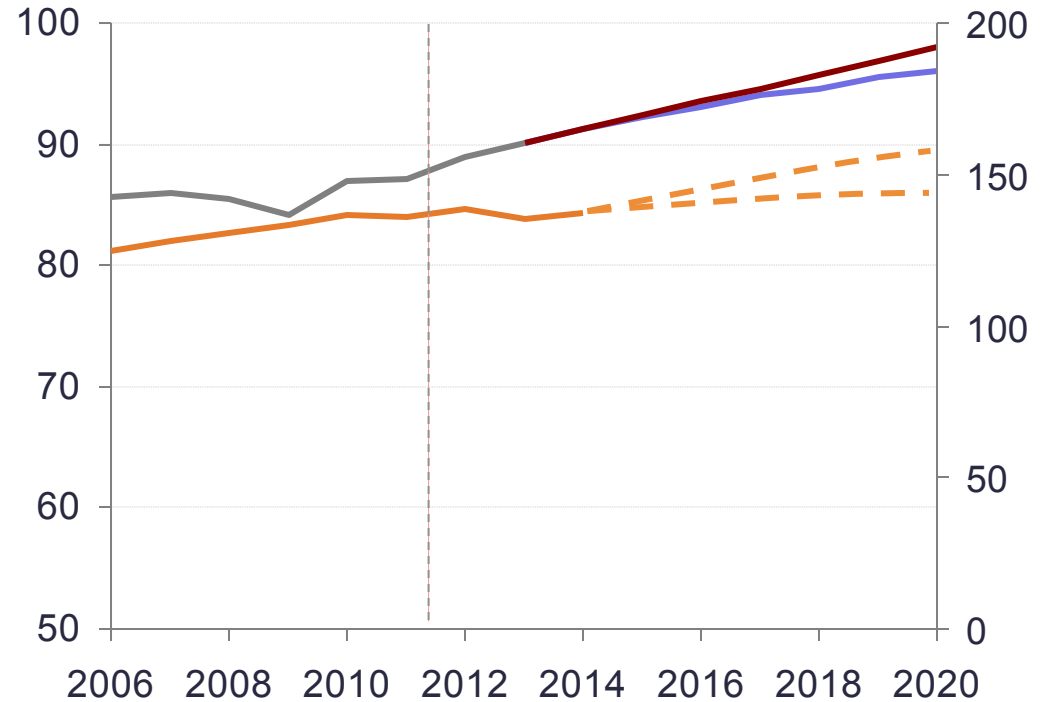
of PTP, production (kboe/d)



Each point represent an O&G company

WORLD OIL DEMAND BY SCENARIO AND PTPS CORRELATION

Mbl/d, thousands of PTPs



— Historical oil demand — Current Policies scenario
— New policy Scenario - - - # PTPs

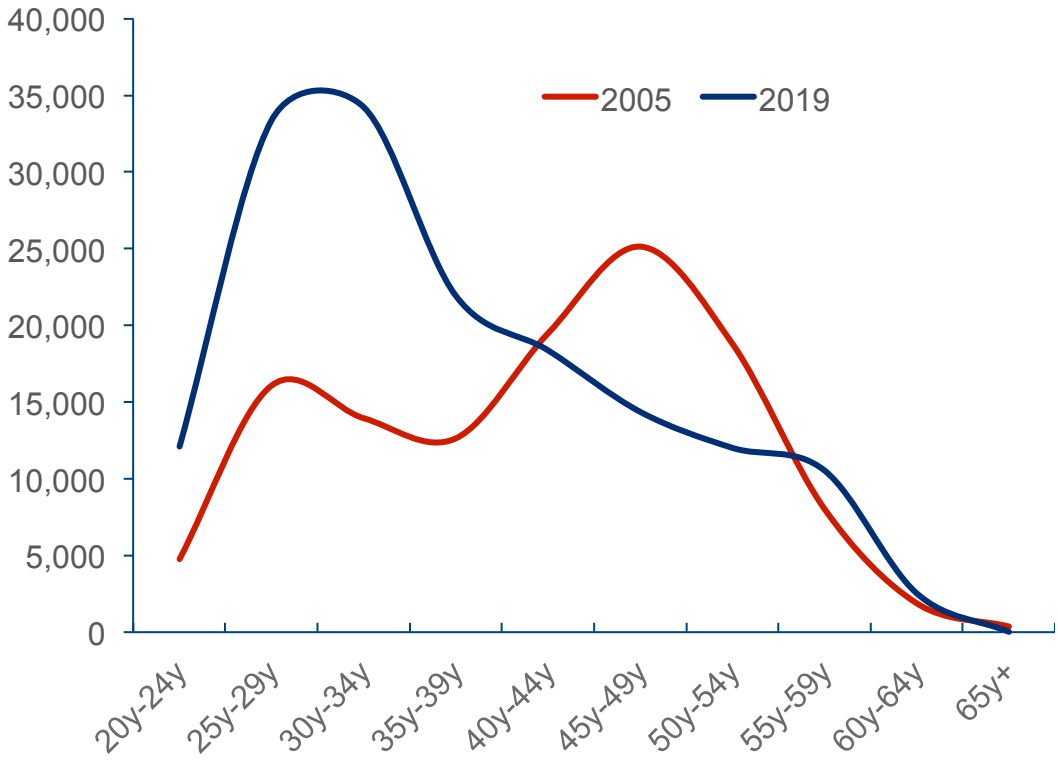
1) PetroTechnical Professionals: Geologists, Geophysicists, Petrophysicists, Drilling and Completion, Reservoirs and Production Engineers

Source: IEA World Energy Outlook 2014, SBC HR Benchmark, SBC Analysis

Talent gap for experienced PTPs will widen

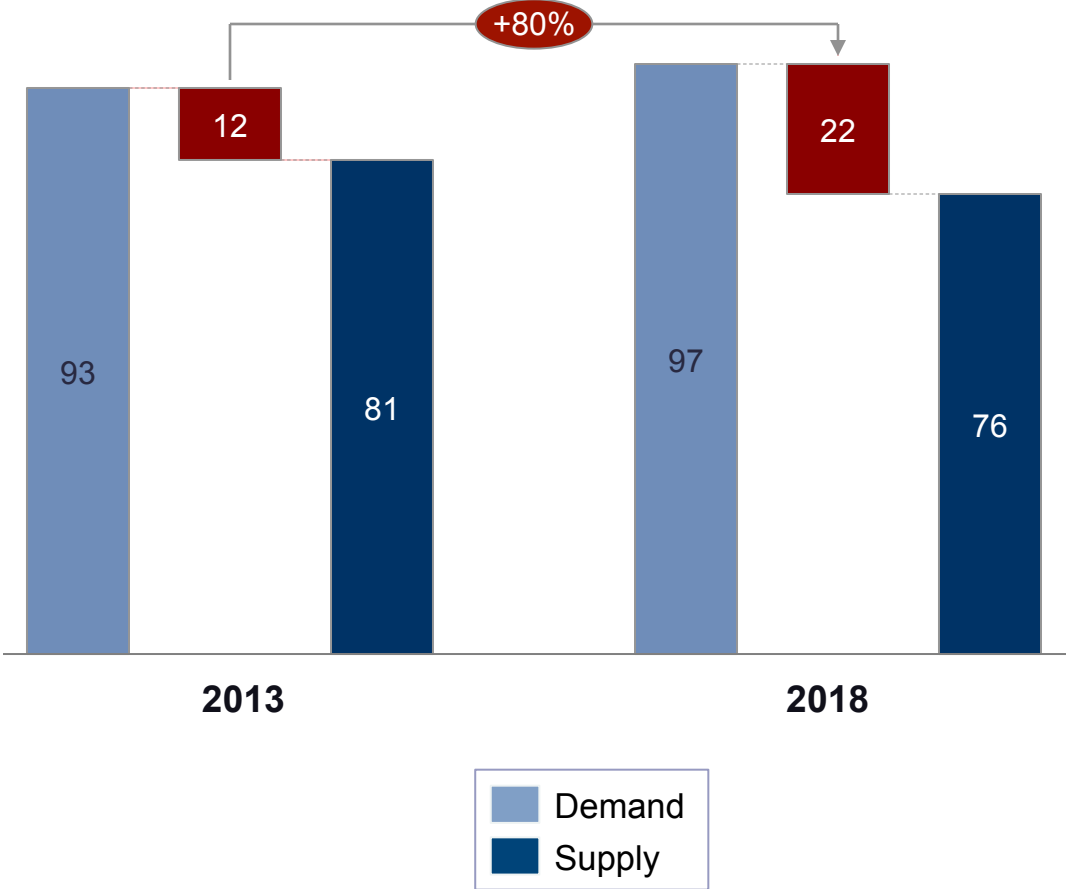
GLOBAL DISTRIBUTION OF PTPS¹⁾

of PTPs



SUPPLY / DEMAND OF EXPERIENCED PTPS²⁾

Thousands of professionals



1) Excluding China and oilfield service companies

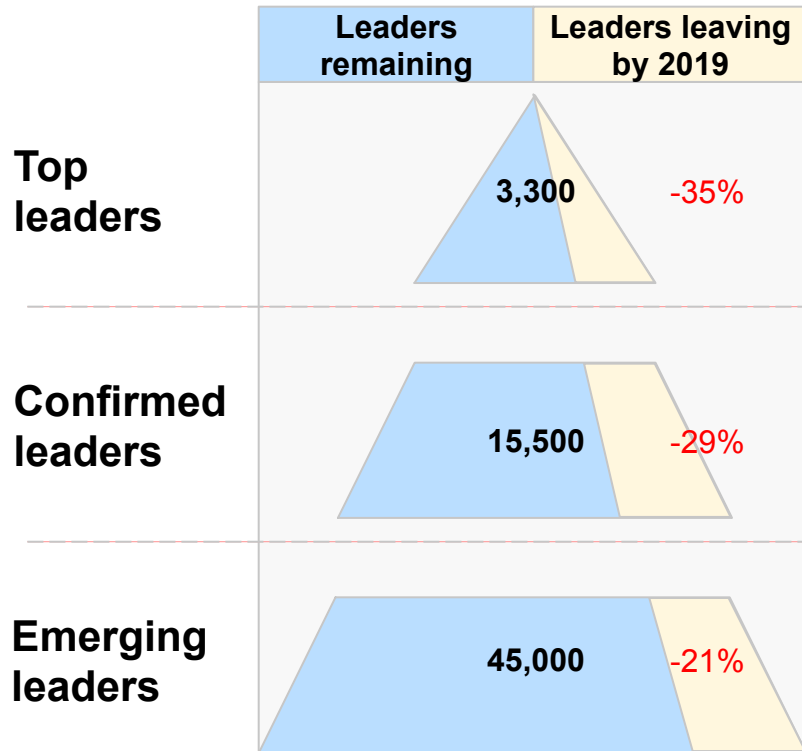
2) Assuming global O&G production would grow by 0.9% a year

Source: SBC O&G HR Benchmark 2014, New Policies Scenario – IEA, WEO2014, SBC analysis

How are we going to manage the leadership transition?

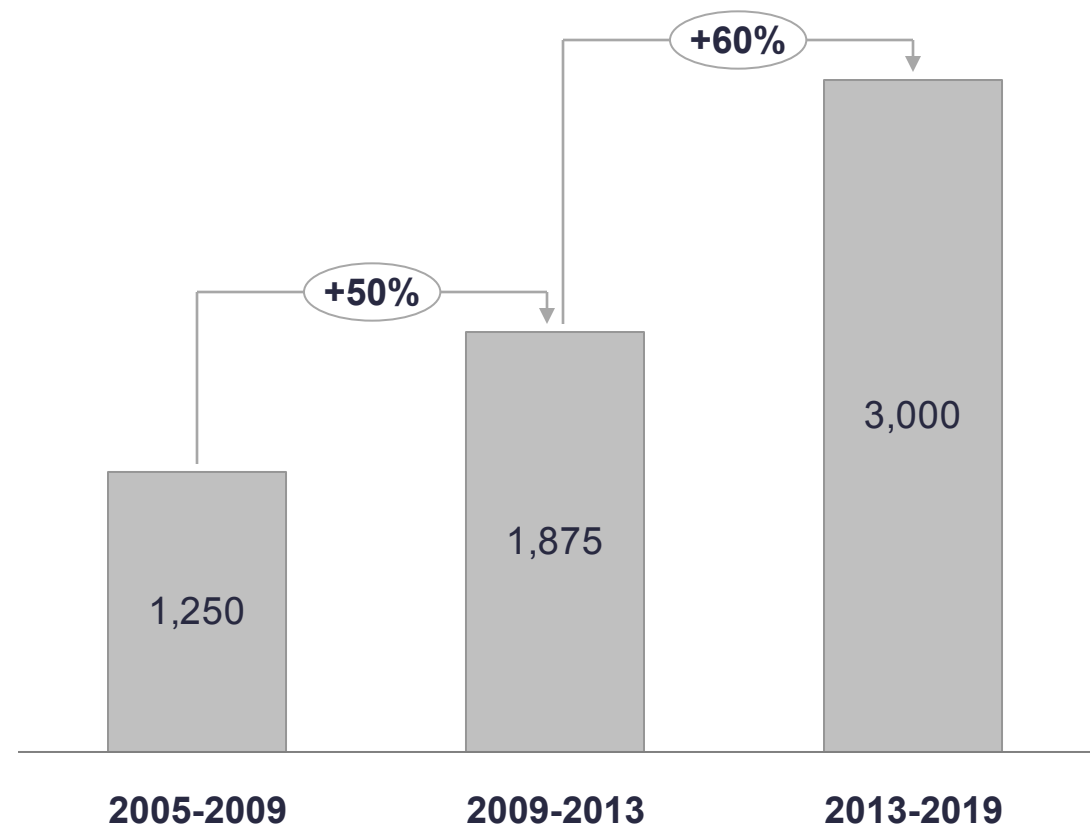
CURRENT LEADERSHIP STRUCTURE¹⁾

Number of leaders, 2013-2019



ADDITIONAL LEADERS REQUIRED²⁾

Number of additional leaders required, 2013-2019



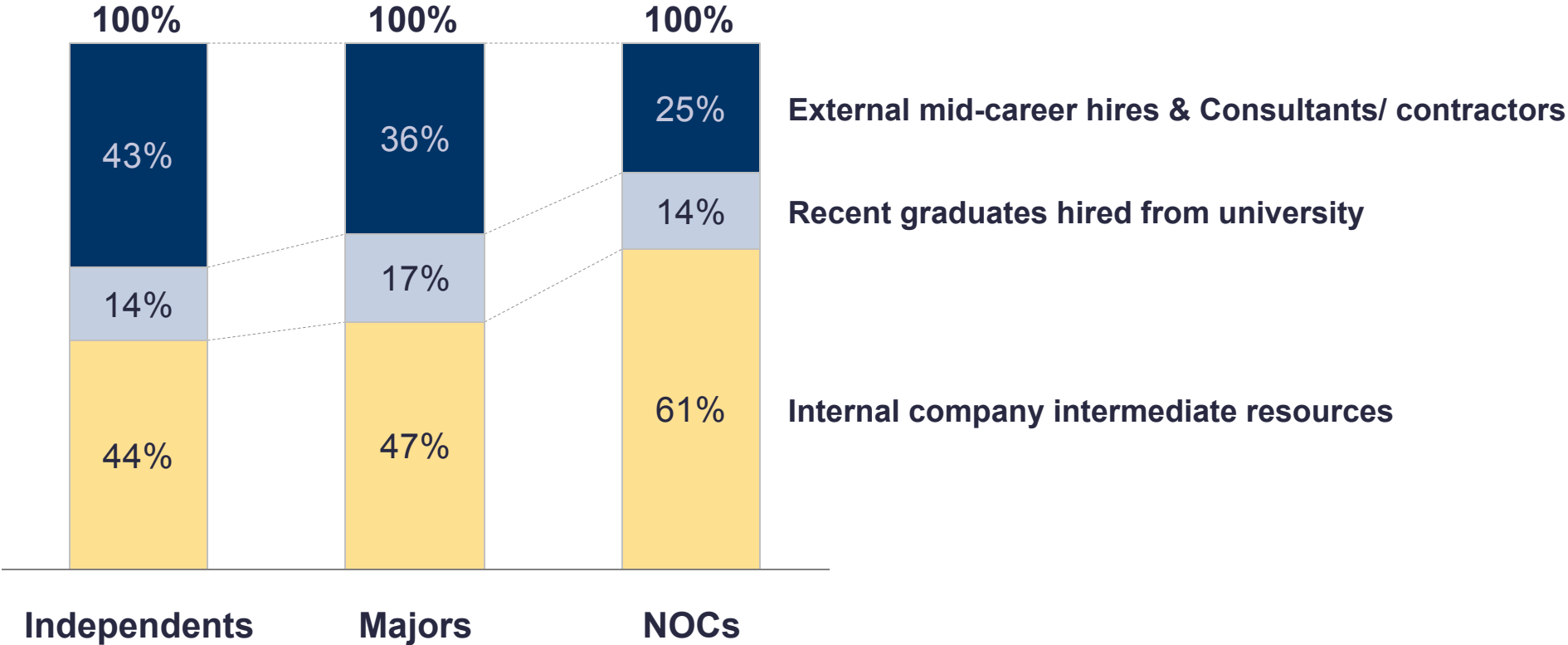
1) Retirement rate at 20% for 55-59 age group, 50% for 60-64 age group, 70% for +65yr; 2%/year attrition for emerging leaders

2) Requirement calculated taking into account industry growth, replacement of top and confirmed leaders and attrition of emerging leaders

Can projects be successful with limited internal resources?

ORIGIN OF INTERNAL PROJECT TEAM RESOURCES

Average of respondents (%)

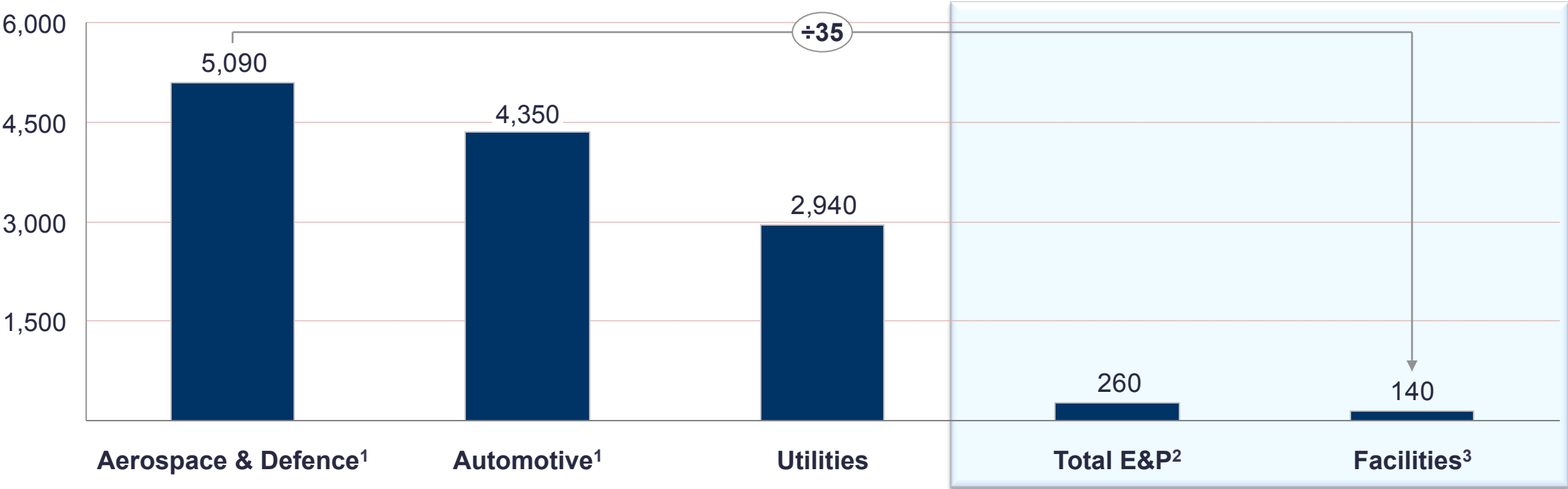


Source: SBC O&G HR Benchmark 2014, SBC Analysis

Do we have enough qualified engineers?

ENGINEERS & PTP STAFF TO CAPEX RATIO

Staff members per Billion USD spent, 2013



1: Based on a sample of representative companies on each sector. Considers industry engineers

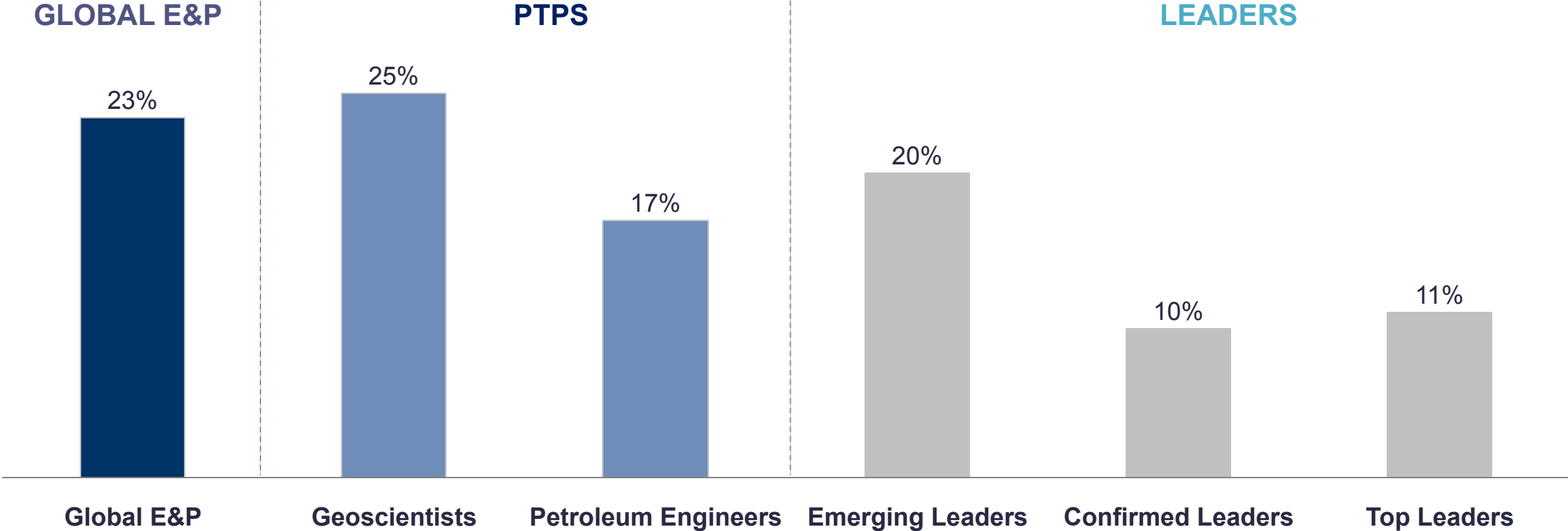
2: E&P Capex/(PTPs + Capital Projects Eng. + Maintenance & Inspection Eng.)

3: Facilities Capex/(Capital Projects Eng. + Maintenance & Inspection Eng.)

Source: Aviation Week, SBC interviews with Airbus executives, SBC HR Forum 2014, SBC Analysis

Do we have enough gender diversity?

% OF FEMALE STAFF
2013, average of respondents

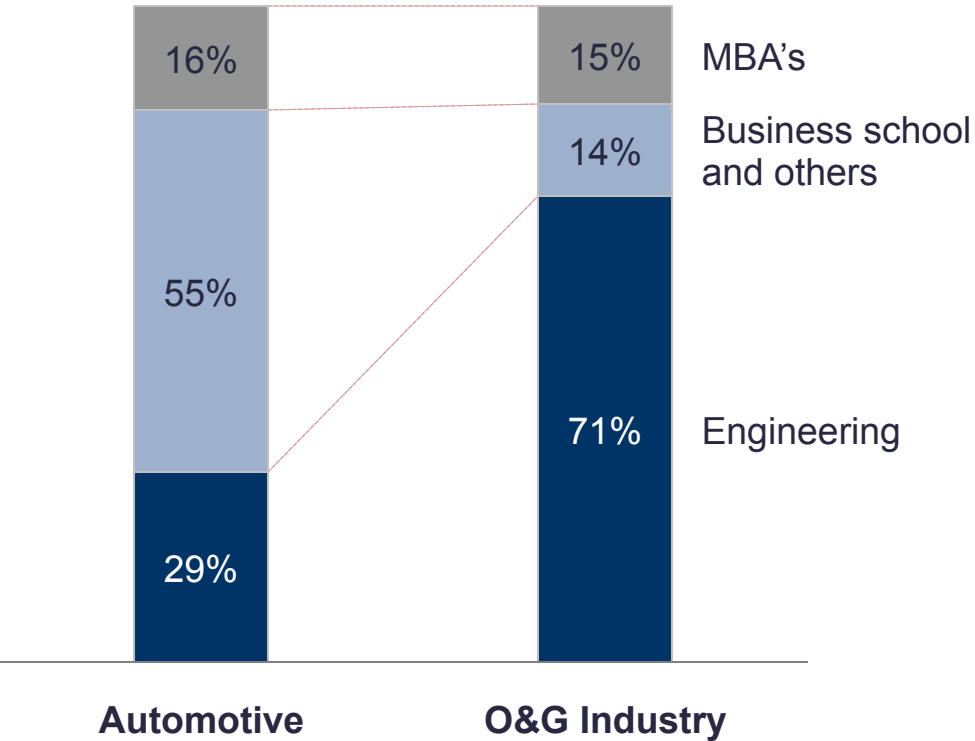


Source: SBC O&G HR Benchmark 2014, SBC analysis

Are we diverse enough in terms of competencies?

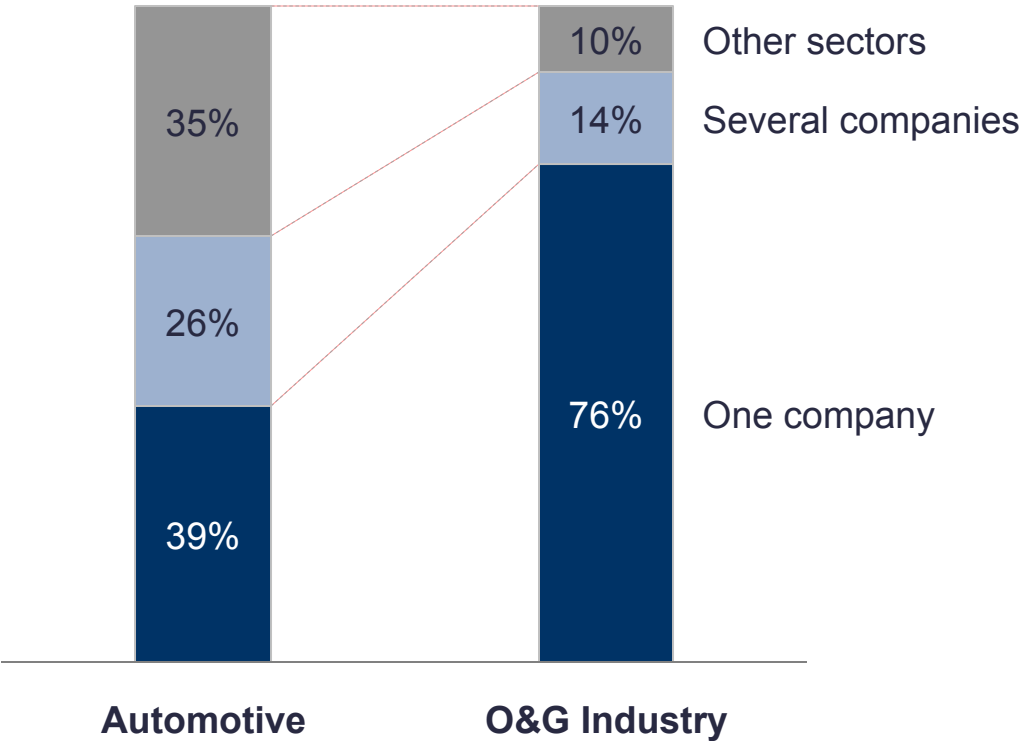
AUTOMOTIVE VS. O&G EDUCATION BACKGROUNDS¹⁾

%



AUTOMOTIVE VS. O&G EDUCATION CAREERS²⁾

%



1: Based on 15 largest Automotive companies
2: Based on 15 largest Oil and Gas companies
Source: SBC analysis