Have you ever been concerned about “what’s next” for your people? Or, “how am I going to acquire the talent I need to meet my business objectives both now and in the future?” If so, you are not alone in your concerns about your talent management needs. As new technologies emerge and organizations increase their global expansion efforts, finding the right people, with the right skills, at the right time is every executive’s and hiring manager’s concern.

According to a Bersin Consulting (a division of Deloitte) survey of global clients, organizations during 2013 faced a growing shortage of talent and leadership – especially in emerging markets.1 There is a sense of urgency for global organizations to invest in talent management programs to meet their expanding people and business needs. The U.S. Census Bureau estimates that within the United States alone, there will be a 47% shrinkage in the working age population between 2000 and 2050. By contrast, there will be an additional six million more jobs than people to fill them due to retirements.2 There may be record unemployment, but those workers available to work are not necessarily skilled enough to meet the demands of the new marketplace both domestically and internationally.

Furthermore, a pending “big crew change” across the oil and gas industry has been well documented for years. It is not only due to the aging of the workforce, but emerging technologies are requiring more qualified workers. There is a tight labor market for the highly skilled and highly trained in the industry; therefore, in addition to buying talent, companies will need to develop their own and more of it - quickly.3 “Oil and gas companies that successfully navigate the talent crisis will take a holistic approach to attract, develop and retain new employees.”4

At IHRDC, we specialize in meeting those development and skill gap challenges to attract, develop, and retain employees using our proprietary Competency Management system and suite of services, linking the talent management philosophy with consulting and technology services to help you meet your global talent management needs and align with industry best practices. We believe that strategic talent management is no longer the role and responsibility of the Human Resources department alone, but the organization as a whole.

Purpose

This document outlines the importance of competency creation, implementation, engagement with senior leadership, best practices, and the overarching value proposition of how IHRDC’s Competency Management System (CMS) can meet your talent management needs.
It is important to outline the basic definition of what we mean by competencies, competency models, and talent management as the backdrop to this document.

**What is a Competency?**

A competency is a set of defined and observable skills, knowledge, abilities, and behaviors required to perform a specific job. A job competency model is a collection of competencies that defines a specific job or job function.

**Why Use Competency Management?**

If competency models are defined properly and are built within the context of an organization’s vision and values, they can be leveraged into meeting your human capital goals and objectives – thus business objectives.

According to a survey conducted by the Corporate Executive Board, 85% of Fortune 500 companies surveyed feel they have an inadequate number of global leaders and talent supply. Therefore, to gain the advantage in the global marketplace, it is critical for organizations to develop their competency models to meet strategic business objectives.³

In addition to developing employees in specific disciplinary subjects, the most successful individual contributors and leaders are “T-shaped thinkers” – those that have a deep functional subject matter expertise in addition to a broad cross-functional knowledge base.⁶

Developing a robust set of competencies organizationally and at the job level establishes a framework to support the growing globalizaton of companies across the dimensions of the talent wheel to include, but not limited to: recruitment and selection, onboarding, job profiles, learning and development, training, performance management, career development, and succession planning.

**What is Competency Assurance?**

Competency assurance is the clearly defined process of establishing the competencies, assessments, and access to training utilizing consistent and objective standards across the organization. The main premise behind competency assurance is to ensure consistency and equal application of how the tool is built, utilized, and maintained. In addition, competency assurance ensures assessments are rigorously implemented by qualified assessors and results are substantiated through the collection of evidence.

**How do Competencies Differ from Performance?**

Competencies are the skills, knowledge, abilities, and behaviors required to perform a specific job. By using a proficiency scale, competencies indicate if a person meets certain criteria and how well a person demonstrates the ability to do a job. By contrast, performance measures output, e.g., how well a person completes a specific task and adds value to the organization.
What is Talent Management?

In simplistic terms, talent management is how an organization builds and mobilizes talent across the organization. Research has shown companies that engage in an integrated talent management strategy provide for greater learning and development opportunities and individual career management inevitably leading to lower turnover rates.\(^7\)

Talent management includes the strategic components of the lifecycle of an employee engaging in a new job, either new to an organization or newly promoted within an organization. Typical talent management phases include:

- Recruitment
- Onboarding
- Job Profiles (Job Description, Compensation, Competencies)
- Learning Plans (Individual Development Plans)
- Training and Development
- Performance Management
- Career Development
- Succession Planning

Applying an integrated talent management structure using competencies as the basis will help your organization:

- **Attract** top talent to an organization that is vested in their employees’ individual development
- **Develop** T-shaped thinkers via assessment and the identification of learning needs in both the deep technical and cross-functional directions
- **Retain** a highly trained workforce
Competency Management System and Talent Management

Companies that are most successful treat their employees the same way as their business lines: carefully analyzed and strategically developed to support business goals. These types of companies:

- Identify the competencies and experiences needed to meet their strategic goals and plan
- Identify the gap between their needs and current resources
- Acquire the talent they need by developing their own internal and recruiting new staff

The CMS process and utilization of CMS Online identifies the skills and competencies needed to perform a specific position using data and interviews from the client. Using both an employee and manager assessment process, the employee developmental opportunities (skill gaps) are identified and real-time development plans are created at the individual level. Human resources and learning and development organizations are now armed with real data to support program offerings to meet real business needs.
The Value Proposition of How CMS Feeds an Integrated Talent Management Structure

Competencies serve as the basis of any integrated talent management strategy and facilitate the link between the business strategy and an organization’s talent management philosophy. Integrated talent management helps companies strategically leverage talent.¹⁹

Most literature indicates that companies tend to introduce competencies for a specific purpose. Over time organizations have a tendency to repurpose models to use across the talent management process. Today, companies that utilize competencies use them for an average of nine HR processes.¹⁰

Establishing core competencies at the organizational level helps employees understand how the company views talent and promotes behaviors that reflect the company’s vision and values.¹¹ Developing a competency framework also provides for a consistent set of behaviors and language that can be used across talent management. Lastly, competencies can facilitate talent management strategy discussions and can be leveraged into any organization’s talent management initiatives.

Below you will find a sample of an integrated talent management cycle and the areas where IHRDC supports many of the talent management directives. Competency development feeds several of the elements of the talent management wheel. IHRDC can have impact on six of the major talent management directives, with a specific focus on Job Profiles, Individual Development Planning, and Training and Development.
## CMS Online Talent Management Deliverables

### Talent Management Directive

<table>
<thead>
<tr>
<th>Directive</th>
<th>Definition</th>
<th>CMS Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment and Selection</td>
<td>The process of filling positions via internal or external channels to meet the human capital needs of a business.</td>
<td>By identifying core competencies for key positions, the skills, knowledge, abilities and behaviors can be incorporated into an organization’s selection system – once internally validated for selection purposes.</td>
</tr>
<tr>
<td>Onboarding</td>
<td>The process of bringing a new or newly promoted employee up to speed in a new organizational environment. This can include an organizational, cultural, and/or performance overview and individual expectations.</td>
<td>“Trainee” or “Early Career” competency models can be created that help in directing new hires’ training goals for the first phase of employment. These streamlined models can be used to develop targeted onboarding or orientation programs for new or newly promoted employees.</td>
</tr>
<tr>
<td>Job Profiles</td>
<td>The identification of critical skills, knowledge, abilities, and/or behaviors essential to perform and be successful in a role. Can include compensation structures, job descriptions and competency models.</td>
<td>- Job-specific, standardized Competency Models. &lt;br&gt; - Competency Assessments including employee self-assessments, supervisor assessments and qualified assessor assessments or verifications.</td>
</tr>
<tr>
<td>Learning Plans (LP) or Individual Development Plans (IDP)</td>
<td>Assists the employee in the individual development process by providing a gap analysis and development plan of how to be successful (competent) in a current and/or future position.</td>
<td>- Actionable Learning Plan based on outcome of competency assessments targeted toward short list of prioritized gaps. &lt;br&gt; - Formal Learning Plan report and online planning tool accessible by both employee and supervisor to include a variety of learning vehicles, e.g., classroom training, self-study, coaching, and on-the-job training.</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Provides for training and development opportunities via multiple learning channels for employees to gain additional skills, knowledge, abilities, etc., thus building a higher performing workforce.</td>
<td>- Robust library of training resources and recommended training programs. &lt;br&gt; - Can incorporate outside vendors as well as IHRDC’s training library. &lt;br&gt; - Stimulate knowledge transfer from experienced personnel by using CMS Online’s Learning Plan features.</td>
</tr>
<tr>
<td>Performance Management</td>
<td>The process of aligning corporate objectives with individual objectives, establishing clear accountabilities, tracking individual progress and providing employee feedback.</td>
<td>The completion of Learning Plan goals and on-the-job training requirements can be built into an employee’s objectives and the overall performance management process.</td>
</tr>
<tr>
<td>Career Development</td>
<td>The process by which an employee takes ownership of developing their capability in making a contribution to the organization working with a manager or mentor.</td>
<td>The system allows for employees to see career progression requirements (by levels) and a clear path for how to achieve new positions using real company data, based on standards and current competency status.</td>
</tr>
<tr>
<td>Succession Planning</td>
<td>The identification of high-potential employees, assessing skills and preparing them for future positions key to the long-term success of the business and organizational objectives.</td>
<td>The gap analysis and standardized competency models identify who in the pipeline is the best fit for each position based on the current competency profile.</td>
</tr>
</tbody>
</table>
You may be asking, “how is this different from my Enterprise Resource Planning (ERP) System or Learning Management System (LMS) and why should I add a new technology platform?” The CMS Online product enhances talent management capabilities and supplements existing technology, but does not duplicate efforts. CMS Online has been built from the ground up to be forward looking for assessing and developing competency. It can be loaded on your internal servers offering a bidirectional feed with both your ERP and LMS. Outlined below is an overview of how CMS compares with ERPs and LMSs.

<table>
<thead>
<tr>
<th>System</th>
<th>Function</th>
<th>Software Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERP or HRIS</td>
<td>Business Intelligence</td>
<td>SAP, Oracle</td>
</tr>
<tr>
<td>LMS</td>
<td>Centralized Training Resource</td>
<td>Success Factors, SumTotal, Saba</td>
</tr>
<tr>
<td>CMS</td>
<td>Strategic Talent Management</td>
<td>CMS Online</td>
</tr>
</tbody>
</table>

### Differentiating from the “Others”

<table>
<thead>
<tr>
<th>HR System</th>
<th>ERP</th>
<th>LMS</th>
<th>CMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboarding</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Job Profiles</td>
<td>Compensation ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Job Profiles</td>
<td>Competency ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Learning Plans or Individual Development</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Course recommendations ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Registration ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Centralized course listing ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Course hosting ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Course tracking ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Knowledge transfer ✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Performance Management</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Career Development</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Succession Planning</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Core HR and Payroll</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time and Attendance</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Competency Framework

Investing the time and resources to establish an agreed competency model framework pays significant benefits across the talent management architecture and how competencies will be utilized within an organization. Establishing common rules for defining competencies in an organization will set the stage for competency utilization and buy-in, and will help answer questions such as:

- How many competency units should be included in each job competency model?
- Will the models include behavioral as well as technical or functional competencies?
- How will cross-disciplinary competencies be handled?
- How often should the competency models be reviewed?

Competency Model Criteria

There are three basic criteria necessary for a competency model to meet the needs of the business and to have an impact on Talent Management.13

1. Competency models should include the competencies an employee must have now and in the future
2. Competency models must support the intended utilization (For example: Assessment, Development, Performance Management, etc.)
3. Competencies must be easy to use and understood across the organization

The Elements of a Competency Model

Frameworks can vary from one organization to another and each company must decide which model works best. The following figure depicts a structure typically used as the basis for the development of competency models.14 This structure combined with a competency library establishes the basic framework for developing competency models aligning with a T-shaped thinker.
IHRDC builds competency models in a T-shaped structure where the competency model cascades from high-level core competencies that provide a common foundation, down to the technical specific competencies required of the function. Finally, we add in location specific competencies to help make global models feel localized to specific jobs and government requirements.

In the figure below you will note the T-Shaped structure of the Electrical Technician competencies denoted in the text outlined in blue.

The engineers of the future will likely be “T-shaped thinkers,” deep in one field but able to work across all fields and communicate well.

-Cherry A. Murray, Dean of the School of Engineering and Applied Sciences, Harvard University

To ensure competency adoption and utilization, organizations should limit the amount of competencies that should be included in an individual model. IHRDC does not have a set guideline on the number of competencies, but recommends a job competency model should not exceed 30 to 40 for petrotechnical and business support staff or 50 to 60 competency units for field and plant-related staff.

At least 50% of each model should be composed of the job-specific technical/functional skills. The increased number of competencies in the field- or plant-related models arises from the fact that operations competencies are more task oriented and take less time to develop than the more complex tasks required of petrotechnical and business support staff. Companies that have demonstrated the most success in competency model development, implementation, maintenance, and ongoing utilization maintain a strict limit on the total number of competencies in each job competency model. During the implementation process, our consultants will work with your organization to help identify the correct number for your business and cultural needs, applying subject matter expertise and industry best practices.

**Competency Library**

Once competencies have been identified for a specific job, they will be matched with existing competency units in IHRDC’s database of more than 1,500 Competency Units. In many cases, these competency units can be ready for immediate use. However, one of the greatest strengths of the Competency Management group at IHRDC is the ability to customize Competency Units and Competency Models from the robust library specific to a client’s requirements and culture. We have found that customized models show a much higher level of adoption within an organization and starting with a robust generic library ensures an efficient delivery.
Competency Proficiency
The proficiency scales outlined in a standard competency unit reflect the differentiation of skills, knowledge, and abilities within a specific competency. The levels vary by depth and breadth of individual development.

The proficiency scale has several purposes, some of which include:

- The ability to set a common competency standard for all jobs using the same competency
- Allows the job level required to be set for each job competency model referencing that competency unit
- Identifies individual development needs by competency level
- Facilitates development discussions
- Outlines development steps
- Allows for comparison across jobs within a job family
- Identifies an analysis of potential talent management excess or gaps

How Are Proficiency Levels Used?
Proficiency levels set a common standard for any job competency model. Following an assessment, each employee can identify their own skill, understanding, and general competence in a specific competency, and therefore their individual development needs not only for their specific position, but also for all the positions within the job family.

Proficiency Levels
An example of the CMS proficiency levels within a competency is outlined below:
Competency Management System Architecture

A well-developed Competency Management System, once implemented, includes the full cycle of assessment, gap analysis and planning, learning and development and finally, reassessment. Employees can use this well-defined process to ensure their long-term development is matched to job standards for their current job and those they aspire to in the future.

IHRDC, through its experience, industry knowledge, subject matter experts, and research, provides its clients with the basic building blocks and framework to ensure a fit-for-purpose competency management solution to meet each client's unique needs. Ultimately, the process, content, and software are all adapted to fit the needs of the client, but IHRDC's building blocks provide an efficient means to get started and avoid major roadblocks.

Competency Process and Standardization

IHRDC provides the initial foundation that governs the competency assessment, planning and development process. We then work with the client organization to customize and fine-tune the steps and internal protocol for defining the competencies to be used for the job competency model, establish the timing and application of the assessment, and provide access to training and development and a tracking mechanism.

Together the CMS Online tool and outlining a clearly defined assessment and training and development process will ensure the organization's assessment is being implemented with a level objectivity and consistency. By using this process, you will have a workforce that is consistently assessed, trained, and developed.

Competency Content

Using client-approved job descriptions as a primary source of information to build a job competency model, IHRDC's team of resources will collect the necessary data to support the content provided, conduct incumbent and/or supervisor interviews, and update job descriptions as necessary, to identify all competencies required for a specific position.

Competency Assurance

Over the last several years, government regulators have increased the formal mandatory training and competency standard requirements required of operators and contractors operating in the energy industry. By consistently utilizing the end-to-end process, the competency framework and software developed by IHRDC, an organization will be successful in meeting these increasingly strict requirements of competency assurance. Specifically, CMS Online allows the full capture of evidence by employees, supervisors and qualified assessors during the assessment process to ensure assurance requirements are met.
By using IHRDC’s methodology and framework to develop competency models you will have models that are:

- Thorough, yet concise
- Simply written and understandable to be used by the business and gain early adoption
- Practical and relevant to your business and talent management needs
- Focused on action, execution and observable behaviors to drive individual development
- Customized language for your business and cultural needs

Once the competency model is finalized and approved by the designees, it is ready for deployment (Implementation phase) with the employee base.

**CMS Online Software**

CMS Online is the end-to-end competency assessment and development software solution that includes the automation of core talent management components encompassing competency creation, assessment, learning plan creation and management, training and development, career development, compliance, and analytics. IHRDC’s unique combination of software development capabilities and industry experience provides the development of key reporting capabilities that allow operators and contractors to meet increasing government regulations for both compliance and competency related needs.

**Implementation**

During the Implementation phase of CMS Online, a three-step approach is utilized to assist the end user, the employee, in determining his/her target areas for development via the assessment, gap analysis and identification, and learning plan process.

**Assessment**

Once competency models have been built, an assessment is developed to evaluate the job incumbent(s) level of proficiency across the job competency model. IHRDC’s recommended assessment methodology includes employee self-assessment, supervisor assessment, and a third-party qualified assessor assessment. In all cases the assessment focus is on demonstrated ability, or through the use of work products to provide evidence of an individual’s competence. The assessment process is modular and can be customized for each client to meet their unique needs.

**Gap Analysis & Planning**

Upon assessment completion, the software analyzes the data and provides a gap analysis between the job incumbent’s current level of proficiency and what the proficiency level for the JCM should be. Easy to access individual and group level reporting provides employees and managers alike with an easy understanding of the strengths and opportunities for improvement individually and at the organization level.

**Development**

After completing the assessment and gap analysis, a learning plan is created to bring the incumbent to a level of accepted proficiency. The learning plan is tailored at the individual level across a multi-channel learning process to include experiential, online, and classroom learning venues.
It is with the learning plan where the organization’s efforts of creating the job competency models, the time dedicated to employee assessment and financial investment in CMS Online are realized. Learning plans are customized to each employee who has taken the assessment focusing on their individual development needs as determined by the organization in level of importance to either: develop skills required for their current position or develop skill areas necessary to meet short- and long-term business needs. The software can also assist with career development and succession planning.

The learning plan outlines the steps and actions in detail an employee needs to take to bring him/her into the acceptable level of competence as determined by his/her job competency model. It accounts for the time to receive training using a multi-channel approach, to practice the newly acquired skill, and to eventually transfer the new learning to on-the-job application. Best practices indicate that employees who own their individual development are more likely to bring their learning plan to fruition. Therefore, CMS allows the employee to determine when he/she is ready for reassessment on a specific competency. Once it is determined via reassessment that an employee is proficient in a specific competency where a gap once existed, a new focus area is added to the learning plan.

Learning plans are not static documents, but are continuous and ongoing throughout the plan year (as established by the client) and can be easily linked with the annual review process to ensure development is a part of everyone’s performance objectives. Key performance indicators can be gleaned though the robust reporting tool available to establish development benchmarks making your investment a part of day-to-day operations.

An additional side benefit of the entire development and learning plan process is that of employee satisfaction and retention. Organizations whose employees feel their individual contributions are valued and are provided opportunities for personal development report higher rates of employee satisfaction and retention. In the words of Peter Senge, “a learning culture is perhaps the most important asset a company can build.” Simply put, the benefits pay dividends beyond the immediate need of closing a skill gap.

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**Compliance Management**

CMS Online contains a module that specifically addresses compliance, or mandatory, training requirements. Separating compliance and competency based-training helps clients efficiently keep track of regulatory and corporate mandatory training and assists employees with long-term development within the same tool. Employees can see all their training requirements in one, user-friendly software tool.
Analytics and Reporting

By employing the CMS process, the employee, the manager, and the organization all have a clear understanding of skill gaps, learning opportunities, and a roadmap of how to close the gaps. The outputs of this process provide data that can be used across the organization to understand the current state of the organization and to drive strategic decisions regarding talent.

CMS Online has the ability to capture real-time data at each integral phase providing valuable and relevant data to drive the decision making process for the employee, the manager or supervisor, and the organization.

The table below outlines how data can be used at the “Gap Analysis & Planning” phase of the CMS implementation process for each of these three stakeholders. In addition, similar reporting and data tools are available across the entire suite of CMS products bringing analytics and a quantitative approach to talent management for your organization.

<table>
<thead>
<tr>
<th>Gap Analysis &amp; Planning</th>
<th>Employee</th>
<th>Manager or Supervisor</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Detailed report providing the ability for an employee to view individual competency gaps and gap closure rates (via the assessment process) using real-time data using the JCM as the basis of comparison</td>
<td>CMS Online reporting at this level provide similar reports at the manager or supervisor level, but now aggregates the data across the manager’s area of responsibility</td>
<td>Organizational leadership either at the Business Unit Level, Organizational Level, and/or HR can view data at any time to understand aggregate skill gaps, skill gap closure rates, training resources, etc. across the entire organization</td>
</tr>
<tr>
<td>Outcome</td>
<td>Data drives decision making process for individual focus and development planning versus a “gut-feel”.</td>
<td>Departmental leadership now has the ability to guide the strategic direction of the talent management process for determining the best course of action for closing employee skill gaps. Skill gap closure can also be closely linked to the performance management process and/or developing a recruitment plan to close organizational weaknesses.</td>
<td>Strategic decision making regarding how to fill skill gaps, training program investments and channels. Budget and resource decisions are now based on quantitative information about the organizations strengths and weaknesses allowing for easier and better supported decisions.</td>
</tr>
</tbody>
</table>
Summary

IHRDC’s unique background in the oil and gas industry, pedigree as a leading training provider, and capabilities to develop unique software products has created a foundation that aligns business strategy with talent management. IHRDC’s Competency Management system and CMS Online provides an avenue toward the development of T-shaped thinkers to build your workforce and bring closure to the skills gap facing your organization both today and tomorrow. IHRDC’s suite of products offers value in differentiating from the many available HR technologies by providing an integrated solution for many of your strategic talent management needs and real-time reporting and analytics for an otherwise subjective set of HR processes, further aligning Human Resources with business needs.

For more information on IHRDC’s suite of products or to request a product demonstration, please contact us at www.IHRDC.com or by phone at 617.536.0202.

15. Success through Competency Based Talent Management,” Human Resource Systems Group, Ltd. (January 2013)
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