MANAGERS’ PERCEPTIONS OF STRATEGIC WORKFORCE PLANNING
AND ORGANIZATIONAL ALIGNMENT:
A SINGLE CASE ANALYSIS

A Dissertation in
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Rashed Ali Alzahmi

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The dissertation of Rashed A. Alzahmi was reviewed and approved* by the following:

William J. Rothwell  
Professor of Workforce Education and Development  
Dissertation Advisor  
Chair of Committee

Edgar P. Yoder  
Professor of Agricultural Extension Education

David L. Passmore  
Distinguished Professor of Education

Mark Threeton  
Assistant Professor of Education

Roy B. Clariana  
Director of Graduate Studies for Learning and Performance Systems

*Signatures are on file in the Graduate School
ABSTRACT

In the contemporary business environment, organizations are striving to manage their workforce effectively in order to keep up with current needs and achieve sustained high performance while predicting the nature and impact of future changes and challenges. This process requires an effective and appropriate strategic workforce plan (SWP) that meets the organization’s short-and long-term goals. SWP is considered one of the most critical functions determining an organization’s performance and sustainability. It is a process used to align an organization’s human capital strategies and practices to its current and emerging mission and strategic goals to ensure that the organization has the right people, in the right place, at the right time, and at the right cost. Based on several studies, almost every organization regardless of size engages in some sort of SWP, but too often SWP fails to achieve the desired results.

The purpose of this qualitative single case study is to explore, describe, and interpret how managers perceived strategic workforce planning and organizational alignment as aspects of human capital management (HCM) in the Abu Dhabi National Oil Company (ADNOC) and its Group of Companies in the United Arab Emirates (UAE). The conceptual framework guiding this study is the U.S. Government Accountability Office (GAO) model “Human Capital: A Self-Assessment Checklist for Agency Leaders.” Of this model’s five key areas, the study focuses on strategic planning, organizational alignment, and talent because of their relevance to SWP. The data, which were triangulated with documents and archival records, were collected via face-to-face interviews with employees working as line managers for ADNOC and its Group of Companies. Content analysis was used to understand and interpret the findings. The
analysis of the data resulted in the emergence of nine major themes: (1) defining and communicating a shared vision, (2) nationalizing human capital (Emiratization), (3) integrating and aligning policies and practices, (4) identifying current and future workforce needs, (5) promoting engagement and collaboration, (6) evaluating and benchmarking, (7) recruiting and hiring strategies, (8) investing in education, training, and professional development, and (9) offering attractive compensation and benefits. These themes were synthesized into three areas of discussion: strategic planning, organizational alignment, and talent.

The study provides significant evidence verifying how line managers perceive SWP and organizational alignment as aspects of human capital management within their respective organizations. The study found that the areas of strategic planning, organizational alignment, and talent are integrated in ADNOC and its Group of Companies, although a few areas requiring further improvement and implementation were identified. Moreover, the study shows that the organization has logical and well-organized human capital policies and practices that are incorporated and aligned well in support of its strategic goals such that they help the organization maintain a competitive advantage.

The overall conclusion is that any organization must constantly monitor and evaluate all its practices to ensure that its SWP is aligned with its strategic goals so that its mission and vision can be fulfilled. Findings from this study can be used as a basis for furthering understanding of human capital system development and identifying the key business factors in organizations of a similar size and/or with other similar characteristics that may make their SWP more effective.
# TABLE OF CONTENTS

List of Tables ........................................................................................................ vii
List of Figures ......................................................................................................... viii
List of Abbreviations ............................................................................................... ix

Acknowledgments .................................................................................................... x

Chapter 1 Introduction ............................................................................................. 1
  Background of the Study ....................................................................................... 1
  The Problem ......................................................................................................... 11
  Purpose of the Study ........................................................................................... 13
  Research Questions ............................................................................................. 14
  Significance of the Study .................................................................................... 15
  Limitations and Delimitations ............................................................................ 17
  Assumptions ........................................................................................................ 19
  Conceptual Framework ....................................................................................... 20
  Definition of Terms ............................................................................................. 22

Chapter 2 Literature Review .................................................................................... 25
  Strategic Workforce Planning ............................................................................ 25
  Importance of Strategic Workforce Planning ..................................................... 30
  Strategic Workforce Planning Process ............................................................... 33
  Human Capital Self-Assessment Checklist Model ............................................. 40
  The UAE’s Oil and Gas Industry ......................................................................... 48
  Chapter Summary ............................................................................................... 56

Chapter 3 Methodology ......................................................................................... 57
  The Problem ........................................................................................................ 57
  Research Questions ............................................................................................. 58
  Conceptual Framework ....................................................................................... 59
  Research Design .................................................................................................. 60
  Case Study Protocol ............................................................................................ 68
  Sampling Strategies ............................................................................................ 69
  Data Collection .................................................................................................... 73
  Data Analysis ...................................................................................................... 81
  Validity and Reliability ....................................................................................... 86
  The Role of the Researcher ................................................................................ 89
  Ethical Considerations ....................................................................................... 90
  Chapter Summary ............................................................................................... 91

Chapter 4 Study Results ........................................................................................ 92
  Review of the Study ........................................................................................... 92
  Research Findings ............................................................................................... 95
    Research Question 1 ....................................................................................... 97
    Research Question 2 ....................................................................................... 106
List of Tables

Table 1.1  Population by Nationality and Gender, mid 2010 estimates  9
Table 3.1  Approaches to Conducting Qualitative Research  64
Table 3.2  Link Between Research Questions and Interview Questions  76
Table 3.3  Data Analysis and Representation, by Research Approaches  84
Table 3.4  Link Between Research Issues and Data Sources  86
Table 4.1  Themes Identified in Each Research Questions  97
### List of Figures

| Figure 1.1 | An assessment model for human capital management representing the GAO human capital self-assessment | 21 |
| Figure 2.1 | Five-step strategic workforce planning model | 36 |
| Figure 2.2 | Five key components of human capital self-assessment. | 47 |
| Figure 2.3 | Abu Dhabi National Oil Company (ADNOC) corporate structure | 53 |
| Figure 3.1 | Overview of research methodology | 62 |
| Figure 3.2 | Basic types of designs for case studies | 67 |
| Figure 3.3 | Framework for qualitative information reduction | 89 |
List of Abbreviations

ADNOC: Abu Dhabi National Oil Company
GCC: Gulf Cooperation Council
GDP: Gross Domestic Product
HCM: Human Capital Management
HR: Human Resources
HRD: Human Resource Development
SOM: Staffing Organizations Model
SWP: Strategic Workforce Planning
UAE: United Arab Emirates
WFP: Workforce Planning
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Chapter 1
Introduction

Background of the Study

Human capital risks are ranked among the top most significant threats to many organizations’ global operations. A constantly changing workforce environment has challenged organizational leaders to restructure their approaches to human capital management (HCM) in order to achieve sustained high performance and accountability. Advances in technology and evolving labor markets call for new approaches to the management of human capital, as traditional practices based on outdated government policies and standards are out of step with current labor market conditions (U.S. General Accounting Office [GAO], 2000; Mercer, 2009). In response, an increasing number of high-performance organizations “are turning to strategic workforce planning (SWP) to help manage such challenges and more effectively align human capital to corporate goals” (Mercer, 2009, p. 2). Such organizations consider SWP an important tool to gain and sustain a competitive advantage and achieve strategic goals through people.

Strategic planning. According to Drucker (1999), “One cannot manage change. One can only be ahead of it” (p. 73). With proper planning and evaluation, an organization can acquire, retain, develop, and employ talent to meet its goals and needs. Organizations should be prepared to anticipate and overcome future challenges and pursue strategies to achieve their desired results. The challenges organizations encounter can be grouped into three categories: sustainability, technology, and globalization. Sustainability challenges refer to an organization’s ability to succeed in a changing market environment; technology challenges refer to an organization’s ability to use new technology to meet its
goals; and *globalization challenges* refer to an organization’s ability to compete globally (Noe, Hollenbeck, Gerhant, & Wright, 2012).

To meet the overall goal of improving organizational performance, several aspects are needed: a clear strategic plan, effective leadership, a sound organizational infrastructure, and an effective strategic workforce plan through which to acquire and retain a competent workforce. To gain a competitive advantage in both local and global markets, organizational leaders must systematically assess their organization’s performance and identify necessary resources and plan accordingly. Leaders must also manage while anticipating internal and external threats, and they must recognize opportunities for ongoing improvement. Leaders should focus on the long-term and short-term needs of the whole organization and develop a strategic plan that supports their organization’s mission and vision. It is also the job of leaders to ensure that their employees have the ability and the organization has the capacity to pursue its strategy such that the desired outcomes accrue. According to Drucker (1999), “The purpose of strategy is to enable an organization to achieve its desired results in an unpredictable environment” (p. 43). An appropriate strategic-planning process enables organizational leaders to design a strategy to project the future viability of a successful organization. Strategic planning is a methodology used by an organization to determine its future direction and to plan how to achieve its goals (Hewlett, 1999). This method helps organizational leaders and policy- and decision-makers to focus their attention on and make sound decisions regarding the critical issues and challenges in their environment (Wilton, 2010).

**Strategic workforce planning (SWP).** The terms workforce planning, strategic workforce planning, and strategic human resource planning are used interchangeably in
several companies and literatures (Bechet, 2008; U.S. Government Accountability Office [GAO], 2012). Helton and Soubik (2004) defined SWP as “a methodical process of analyzing the current workforce, determining future workforce needs, identifying the gap between the present and future, and implementing solutions so the organization can accomplish its mission, goals and objectives” (p. 240). SWP “is a core human resource management (HRM) process that helps to identify, develop and sustain the necessary workforce skills” (GAO, 2012, p. 7). Hence, SWP is an organizational activity aimed at connecting business strategy to human resource strategy and practices and thereby ensuring effective and efficient investment in human capital to achieve an organization’s long-term goals (Emmerichs, Marcum, & Robbert, 2004; Young, 2010). The aim of the SWP process is to ensure that the organization has the right individuals, in the right place, at the right time, and at the right cost. Recruitment and training can then be focused on identifying and meeting future needs (Young, 2010).

SWP is not a new approach. In fact, it has long been used in large organizations to ensure that the right individual is in the right job at the right time. In the past, though, SWP focused on the short-term and was dictated largely by line management concerns. However, increasing environmental instability, changing workforce demographics, emerging technology, changing organizational structure, and increasing global competition are changing the need for and the nature of workforce planning in leading organizations (Truss, Mankin, & Kelliher, 2012). According to Schweyer (2004):

Organizations that once managed hard assets (land, factories, etc.) using time-proven methods and possessing the confidence that comes with intergenerational
experience and knowledge find themselves today managing less of this type of asset and more of the fluid kind (ideas, knowledge, people and talent). (p. 13)

Today, workforce planning has risen in popularity as the means to manage changes in workforce supply and demand and to implement strategies to recruit and retain competent individuals (Colley, 2006). Therefore, SWP is becoming a key priority and core management practice for many organizations. Young (2006) stated that organizations are urged to initiate or improve their SWP for a variety of reasons including “[an] aging workforce and approaching retirement wave, current and projected labor shortages, globalization, growing use of contingent, flexible workforce, need to leverage human capital to enhance return, mergers and acquisitions, or evolution of technology and tools” (Young, 2006, pp. 9–10). However, the process of preparing and implementing long-term workforce plans is made more difficult by a variable global environment and a changing workforce.

According to Jacobson (2010), SWP does not take place “overnight”; instead, it “requires long-term and significant commitment throughout an organization” (p. 371). Over the past few decades, many organizations worldwide have struggled in their efforts to conduct and deploy SWP (Bechet, 2008; Young, 2010). Competitiveness in the marketplace has compelled organizations to rethink their operational practices. Organizational leaders and planners are challenged to develop appropriate strategic workforce plans and implement them effectively in order to pursue their organization’s mission and survive in a competitive marketplace. Changes in factors related to an organization’s internal and external environments such as demographics, market competition, government policies and regulations, and advances in technology all point to
the importance of SWP (Frantzreb, 1981; Helton & Soubik, 2004). An organization’s ability to accurately assess future workforce needs and align its SWP with its strategic plan are critical to realizing its vision.

Defining a strategic workforce plan to prepare for anticipated changes in workforce demographics and to ensure future business success is becoming a significant concern for many organizations and their stakeholders. The value of SWP on this point is exactly that it allows an organization to develop its long-term capacity in the face of a changing work environment (Choudhury, 2007). Organizations expend significant effort on planning in order to gain a competitive advantage and produce desired results in the long term. According to Rothwell, Graber, and McCormick (2012), “Strategic workforce planning examines how to plan comprehensively for matching the best configuration of the quantity and quality of people to do the work and achieve the desired work results” (pp. 13–14). This approach is used to identify and address current and future workforce challenges in an organization (Phillips & Gully, 2009). Furthermore, SWP is a key element of strategic planning. According to Ball and Gotsill (2011), this process ties human resource decisions to the organization’s strategic plan. Further, Young (2006) made an important distinction between SWP and operational workforce planning, whereby “SWP focuses on broad direction rather than precise number and granular details, which come later, when the organization does operational workforce planning” (p. 31).

SWP is “really a proactive planning discipline, just as strategic planning is” (Bechet, 2008, p. 309). By planning for future workforce needs, organizations can be proactive rather than reactive. In Phillips and Gully’s (2009) view, SWP helps to increase
an organization’s ability to improve its capabilities, reduce costs, and adapt to any economic environment. In essence, any matter that deals with human capital is increasingly recognized as critical to strategic success and competitive advantage (Boudreau & Ramstad, 2007). Economists consider human capital a crucial component of accumulated wealth (Erosa, Koreshkova, & Restuccia, 2010). According to Mello (2002), unlike technology and information, which lose value over time, human capital not only retains its value, but can also increase in value when investments are made in it.

**Organizational alignment.** Based on several studies, almost every organization regardless of size engages in some sort of SWP, but too often SWP fails to achieve the desired results (Bechet, 2008; Young, 2010). A high-performance organization uses the best strategies for integrating its organizational components, practices, core processes, and resources to advance its mission and achieve its goals. Such an organization matches its HCM systems with its strategic and program planning and ensures that it has “the right people, in the right place, at the right time, and at the right cost” (Young, 2010, p. 4). Stiles and Kulvisachana (2003) define HCM as “an approach to people management that treats it as a high level strategic issue and seeks systemically to analyze, measure and evaluate how people policies and practices create value” (p. 3). HCM should be systematically assessed in reference to organizational goals (Rao & Krishna, 2015). Therefore, the SWP of an organization should be integrated and aligned with its core business policies and practices to sustain a competitive advantage and achieve strategic goals (GAO, 2000). Organizational alignment refers to “the consistency of decisions across functions so that activities and decisions across marketing, operations, HR, and other functions complement and support one another” (Kathuria, Joshi, & Porth, 2007, p.
The U.S. Government Accountability Office (GAO) (2000), formally known as the General Accounting Office, stresses that SWP should be explicitly linked to an organization’s shared vision in order to support and achieve performance goals and gain a competitive advantage.

In short, the processes of managing and organizing human capital are critical to achieving strategic success and to gaining and sustaining a competitive advantage (Boudreau & Ramstad, 2007). SWP prepares organizations to handle the “unpredictability” of the business environment and its need for a workforce with given skills, and to control costs and use resources effectively (Rothwell et al., 2012). Key to making the best possible use of limited resources and predicting future workforce needs, SWP can be used to “align the workforce competencies with organizational goals” (Altekar, 2004, p. 56). The SWP process should be assessed to ensure that it is appropriate for and capable of supporting any given organization’s efforts to fulfill its strategic plan and shared vision.

**Demographic and workforce challenges.** The United Arab Emirates (UAE) has achieved remarkable development in many domains over a period of 44 years. According to Harnish (2004), “The most striking thing about the UAE is its rapid rise from a tribal society at a subsistence-level economy to one of the most modern and prosperous countries in the Middle East” (p. 122). Located on the Arabian Peninsula, the UAE is one of the largest oil producers in the world (Al-Rodhan & Cordesman, 2006). Since its first shipment of crude oil in 1962, the UAE has invested heavily in the petroleum industry, infrastructure, and industrial technology to attract and support strategic business growth (Rai & Victor, 2012). The country’s fast-growing economy and supportive government
policy has drawn jobseekers and investors from all over the world (Al-Ali, 2008). These changes also led the country to focus on developing a domestic workforce by improving the educational system to meet new and future demands for a competent workforce and to ensure the country’s competitiveness in the global market (Bahgat, 1999). According to the GAO (2010), “The ability of federal agencies to achieve their missions and carry out their responsibilities depends in large part on whether they can sustain a workforce that possesses the necessary education, knowledge, skills, and competencies” (p. 1).

According to Abdelkarim (1999), “Oil wealth brought spectacular changes in the population structure” (p. 4). The liberal immigration policy, which has been adopted by the UAE, has allowed an influx of large numbers of foreign nationals into the country (Al-Waqfi & Forstenlechner, 2014). In 1968, the population of the UAE totaled 180,000 of whom 36% (approximately 60,000) were foreign nationals (Gardner, 1995). Twenty-seven years later (in 1995), the overall population had reached 2,411,041, of whom only 15–20% were UAE nationals. By the middle of 2010, the population was estimated to be 8.26 million with UAE citizens numbering only 947,997 (approximately 11%), Table 1.1 (United Arab Emirates National Bureau of Statistics, 2011). Overall, the ratio of foreign nationals has increased to a staggering percentage of the total population, such that foreign nationals constitute the majority of both the population and the workforce (Al Abed, Vine, & Vine, 2010). The majority of those foreign nationals are from other Arab countries and from South Asia (Gonzalez, Karoly, Constant, Salem, & Goldman, 2008).

The UAE experienced significant population growth due to massive immigration following the oil boom as well as “a high rate of natural increase as shown by an estimated total fertility rate of 3.4%” (Baud & Mahgoub, 2001, p. 13). According to
recent statistics, 40% of the UAE’s population is below the age of 15; 57.6%, 15 to 64; and 2.2%, 65 and older (Low, 2012). The population is mostly concentrated in the three largest emirates: Abu Dhabi, Dubai, and Sharjah (Harnish, 2004).

Table 1.1
Population by Nationality and Gender, mid-2010 Estimates

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE National</td>
<td>479,109</td>
<td>468,888</td>
<td>947,997</td>
</tr>
<tr>
<td>Foreign National</td>
<td>5,682,711</td>
<td>1,633,362</td>
<td>7,316,073</td>
</tr>
<tr>
<td>Total</td>
<td>6,161,820</td>
<td>2,102,250</td>
<td>8,264,070</td>
</tr>
</tbody>
</table>


According to 2009 population estimates, 64.4% of the country’s total population is engaged in the workforce (Al Abed, Vine, & Vine, 2010). UAE nationals comprise less than 10% of that workforce, and 91% are foreign nationals who are employed overwhelmingly in the private sector (Al-Ali, 2008). Foreign national workers have been an important part of the workforce in the Gulf Cooperation Council (GCC) countries for many decades (Bahgat, 1999), and their presence has been viewed as complementary to that of local labor (Elhiraika & Hamed, 2007). In fact, the labor market in the UAE depends almost entirely on foreign workers in most sectors of the economy except for government. According to Forstenlechner and Rutledge (2011), “No other region in the world is so directly and continually reliant upon such high ratios of ‘temporary’ non-national labor” (p. 26). This heavy reliance on foreign nationals for both skilled and unskilled workers can be explained by the region’s rapid economic growth and increased job opportunities in the UAE and other GCC countries, as well as by a severe shortage of local workforce to support such growth (Bahgat, 1999). According to Daneshy (2007),
human capital shortages will impose other changes in how the oil and gas business operates and create a unique labor market situation. In addition, continued heavy reliance on foreign nationals may undermine the development of a national human resources base with the skills required in a rapidly globalizing economy (Gonzalez et al., 2008).

Therefore, one of the greatest challenges facing organizations in the UAE is that of attracting and retaining a skilled and experienced workforce, particularly UAE nationals, to counter the impact of an ageing workforce, demographic changes, current and projected production demands, and the economic environment. The rapid pace of development experienced by the UAE since the discovery of oil has resulted in several economic and demographic challenges due to under-population, an imbalance in the distribution of the workforce in the labor market, insufficient educational institutions, and a shortage of skilled labor (Bahgat, 1999; Gonzalez et al., 2008; Gorgenländer, 2011).

More precisely, Rai and Victor (2012) stated that “The biggest challenge has been to create indigenous Emirati talent because the population base is small and the system of high school, university, and postgraduate education is weak” (p. 481). In regard to these challenges, organizational leaders in the UAE find themselves in urgent need of securing the future of their organizations by ensuring that they are well equipped with skilled workers and have an appropriate strategic workforce plan pertaining to how, where, and when to recruit more employees.

A well-prepared organization recruits, develops, and retains employees with the competencies needed in the future. SWP is necessary to prepare organizations for these challenges given that its purpose is to help organizations anticipate and plan for change. In addition, organizations must ensure that their strategies and practices are aligned with
their strategic goals. The GAO emphasized the importance of aligning policies and practices with all the key elements of operations in an organization as follows: “Leading organizations recognize that sound planning is not enough to ensure their success. An organization’s activities, core processes, and resources must be aligned to support its mission and help it achieve its goals” (1996, p. 18).

Existing and anticipated demands for talented employees compelled UAE officials to develop strategic workforce plans to address the under-population issue in the face of a growing economy (Low, 2012). The government has made a significant effort to improve the country’s educational system and develop its workforce, particularly as much of the foreign labor force is categorized as “low-skilled” (Gubash, 2010). This is a critical deficit, as the UAE’s continued economic success depends entirely on the quality of its workforce. Organizations in the UAE are urged to cope with the fast-growing economy as well as to raise the ratio of UAE nationals in their organizations. Therefore, appropriate strategic workforce plans are crucial to organizations in the UAE in order to continue economic wealth and growth and meet the government’s requirements for indigenizing jobs, i.e., for “Emiratization.” Also referred to as nationalization or localization, Emiratization is a policy designed to reduce the UAE’s over-dependence on imported foreign workers and to increase the participation of the local workforce in the labor market (Gonzalez et al., 2008).

**The Problem**

SWP is a process used to align the needs of an organization with its workforce. Its purpose is to provide a basis for an organization to meet its long-term objectives and advance its mission. Bechet (2008) argued that even though many organizations
understand the importance of SWP and create excellent processes, most continue to fail to implement them properly. In Bechet’s view, such organizations will never produce the results they desire. Plans are often too vague and unrealistic to achieve the organization’s goals. However, as much as SWP is important, even more important is how organizations conduct it (Bechet, 2008). Developing appropriate SWP firmly connected to the organization’s strategy is considered one of the greatest challenges that organizational leaders and decision-makers encounter (El-Quliti & Al-Darrab, 2009). SWP, “a key component of strategic human capital management, is about aligning an organization’s human capital—its people—with its business plan to achieve its mission” (Cotten, 2007, p. 6). Therefore, all an organization’s human capital components, policies, programs, and practices should be geared toward achieving vision and the mission. Overall, therefore, an organization’s leaders and decision-makers should have a clear understanding of their organization’s SWP and management system. That is, through an ongoing process of assessment and evaluation, leaders and decision-makers can design an effective SWP to help address current and projected shortages, for example.

The Abu Dhabi National Oil Company (ADNOC) and its Group of Companies place great emphasis on staying competitive and ensuring that the right people are in the right jobs to support the growth of their business (ADNOC, 2011). Among the top strategic priorities of ADNOC and its Group of Companies is that of recruiting and developing talented UAE nationals (ADNOC, 2012). ADNOC and its Group of Companies are “committed to the UAE government’s plan to create employment opportunities for UAE nationals, known as ‘Emiratization’” (ADNOC, 2011, p. 53). Emiratization is a UAE government strategy intended to reduce the country’s heavy
reliance on foreign workers by increasing the share and participation of UAE citizens in various sectors through a set of policies and regulations aimed at influencing and dictating various employment practices (Gonzalez et al., 2008). According to Rees, Mamman, and Bin Braik (2007), “There is no one agreed way of Emiratization; however, best practice includes commitment to Emiratization through leadership and the implementation of organizational policies and processes that support Emiratization” (p. 33). Despite being a leading organization for developing UAE talent, ADNOC and its Group of Companies have failed to meet their Emiratization targets consistently over the years (Rai & Victor, 2012). ADNOC’s SWP goal is to reach its Emiratization quota, whereby 75% of its employees would be UAE citizens by the end of year 2017. As a result, ADNOC leaders have allocated millions of dollars each year toward educational and training programs and other human resources management activities in order to address this issue and build enough Emirati talent (ADNOC, 2011). In this effort, they have established a number of educational programs and technical institutes to supply their organizations with the qualified workforce needed to carry out business operations. However, the challenge for these organizations is to ensure that current SWP aligns with their mission and vision and can provide a basis for achieving strategic goals in the long term. Overall, the literature indicates a greater need for effective SWP and in particular the allocation of workforce and organizational alignment.

**Purpose of the Study**

The GAO (2000) states the relationship between strategic human capital planning and management and organizational goals as follows: “All human capital policies and practices should be designed, implemented, and assessed by the standard of how well they
help the organization pursue its shared vision” (p. 2). On that basis, the purpose of this qualitative study is to explore, describe, and interpret how SWP and organizational alignment are perceived as aspects of HCM by line managers in the Abu Dhabi National Oil Company (ADNOC) and its Group of Companies in the UAE. In order to capture their perceptions, a case study was conducted based on data collected from face-to-face interviews and triangulated with documents and archival records to ensure that the findings would be strong and grounded. Given the study design, the findings provide a rationale for enhancing the process of workforce planning and its place in the strategic planning system as well as other policies and practices that pertain to human capital in these companies. The findings can also help in the design and development of a self-assessment checklist tool to support other organizations of a similar size and/or with other similar characteristics in recognizing the strengths and limitations of their existing human capital policies and practices.

**Research Questions**

The following research questions guiding this qualitative research study are as follows:

1. What are the perceptions of the line managers at ADNOC and its Group of Companies of their strategic workforce planning in achieving their strategic goals?
2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?
3. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?
Significance of the Study

There is an urgent need for appropriate HCM and SWP in the UAE’s organizations, particularly in the oil and gas sector, which is considered the backbone of the country’s economy. As discussed, current shortages in skilled labor in the petroleum industry and an overall demographic imbalance in the labor market provide a rationale for conducting a thorough examination of current strategic workforce plans, the ways in which they are executed, and the extent to which they are successful (i.e., the extent to which they align with and support the company’s efforts to meet strategic goals). For organizations to succeed in today’s constantly changing market, they must regularly analyze and assess their current capability, identify their business needs, and deploy an effective action plan. Organizations must develop effective solutions to meet any shortages in their labor force and focus on minimizing costs and leveraging resources (Rothwell et al., 2012). These processes require effective human capital, focused management, and a strategic workforce plan that meets the organization’s short- and long-term goals.

Most large organizations perceive SWP as a necessary tool to gain a competitive advantage and achieve long-term business objectives (Goodman, French, & Battaglio, 2015). It is a valuable tool that provides policy- and decision-makers with the means to address important issues related to education, training, and choice of occupation (Wong, Chan, & Chiang, 2011). SWP is understood as “A strategic planning process for human resource management. It involves taking steps for systematically matching the projected staffing needs of a jurisdiction with the available and emerging employee skills in the labor market” (Choudhury, 2007, p. 264). It is a critical process that helps organizations develop a plan of action to ensure that the right number of people with the right skills will
be available at the right time and in the right jobs (El-Quliti & Al-Darrab, 2009). Appropriate SWP helps to identify areas of the workforce that require more attention and helps to ensure that suitable replacements are available to fill critical positions (Jacobson, 2010). Ultimately, effective SWP aligns an organization’s human capital with strategic planning and core business practices in order to achieve strategic goals.

Training and development professionals and policy-and decision-makers should be able to analyze current workforce capacity and understand the value of SWP in order to address future labor demand and supply. Achieving a match between the demand for certain kinds of labor and the supply of that labor is a key process in the labor market—an important element in the analysis of complex national economic connections (Korovkin, 2011). However, the connections between the projection and decision-making functions are weak in many organizations because decision-makers and planners tend to disagree about priorities (Makridakis & Wheelwright, 1987). Therefore, SWP can provide training and development professionals and policy-and decision-makers with advanced warning about likely shortfalls or surpluses, and hence avoid a mismatch of resources and the negative effects that come with it (Wong, Chan, & Chiang, 2011). Through this process, decision-makers and planners can gain a foundation for determining and addressing priorities and modifying policies to reach both company and national goals.

According to Leary (2008), “Studying a few particular individuals in detail can provide a wealth of ideas for future investigation” (p. 322). The present study is significant in providing rich descriptive data about line managers’ perceptions of SWP in their respective organizations. A few studies have explored participants’ perceptions of
SWP and organizational alignment in the literature. However, no research has been done on SWP and organizational alignment for any organization in the UAE. Therefore, the data collected provide valuable information to be referenced by other organizational leaders and planners who either have an SWP process in place or wish to implement one. Further, the findings from this study make a significant contribution to the growing body of knowledge in the field of strategic human resource management by providing initial insights into the extent to which and the conditions under which workforce alignment leads to better organizational performance. The study provides organizational leaders, decision-makers, and planners in ADNOC and its Group of Companies with the empirical information needed to re-evaluate their current SWP practices and policies. On this basis, they have the means to ensure that effective and realistic long-term plans are in place and aligned with the organization’s strategic plan. Moreover, the study provides significant evidence verifying how line managers perceived SWP and organizational alignment as integral to HCM in their respective organizations. The analysis also contributes to our understanding of the organization’s internal environment and its HCM strategy. Last, the study’s framework provides a foundation for assessing how well the existing human capital approaches of ADNOC and its Group of Companies support the companies’ respective missions, goals, and other organizational needs.

Limitations and Delimitations

According to Patton (2002), “There are no perfect research designs. There are always trade-offs” (p. 223). And, similarly, in Azlan’s (2003) view, the limitations and delimitations of a research study are parameters for establishing the boundaries, exceptions, and reservations of every study. Limitations identify potential weaknesses or
problems in the study, whereas delimitations limit the scope of the study (Creswell, 2005). The present study has several limitations that readers should be aware of. The qualitative nature of this study renders its findings ungeneralizable—it its scope is limited to the existing practices and policies of ADNOC and its Group of Companies in the UAE (a single case study). Thus, the findings may not be meaningful or relevant to other organizations or workforce categories. This is largely due to the region’s unique demographic features, which include a small population size, a high percentage of youth (15–24) relative to the working-age population (15–64), and a high immigration rate. However, generalization is not a focus of this study.

In addition, this study is limited by the interview participants’ willingness to share openly and their ability to articulate their experience and point of view. Moreover, it is limited to the perceptions of employees who are in line management positions in ADNOC and its Group of Companies only and does not include the perceptions of any other category of employees. Researcher bias represents another limitation of the study. As the primary instrument for data collection and analysis in this study, the researcher may have influenced the interpretation of the interviews and secondary data. However, researcher bias is inevitable in qualitative research (Janesick, 2000). Moreover, the framework is based on United States research, which may or may not reflect the participants’ perceptions of the focal subjects of the study. The study’s delimitations include the study’s sample size, which is limited to one site, ADNOC and its Group of Companies, with pre-determined criteria. Last, the study relies on a purposively selected sample that is relatively small.
Assumptions

SWP is becoming an important tool in every sector of the economy such that most organizations conduct some type of SWP. Therefore, one of the underlying assumptions of this study is that ADNOC and its Group of Companies employ some sort of workforce planning strategy. An additional assumption of this study is that the selected site recognizes the importance of the linkage between human capital strategy and overall organization strategy direction. A preliminary review of documents collected from these organizations indicated that they do have a workforce planning strategy and process, but information about the organizations and their SWP activities and procedures is limited. One of the tasks of this research study was to collect data and information in order to provide an in-depth understanding of the companies’ SWP processes. This understanding is essential to analyzing the collected data and drawing conclusions about the perceptions of SWP and organizational alignment.

Moreover, the researcher assumed that the interviewees would be able to adequately and accurately convey their perceptions on the investigated topics through semi-structured face-to-face interviews. According to Patton (1990), “The purpose of interviewing is to find out what is in and on someone else’s mind. We interview people to find out from them those things we can’t observe” (p. 278). Another important underlying assumption of the study is that the participants’ perceptions of SWP and organizational alignment would provide valuable insights for all professionals involved in the workforce planning and HCM fields. It was assumed that the participants would provide honest responses to the questions asked and that their responses would be pertinent to the study’s focus. To increase the likelihood that this assumption would prove correct, the
participants were assured of anonymity, i.e., that their answers would not be attributed or attributable to them individually.

**Conceptual Framework**

According to Leshem and Trafford (2007), “The conceptual framework is a bridge between paradigms which explain the research issue and the practice of investigating that issue” (p. 99). The present study’s conceptual framework is drawn from the GAO’s document, *Human Capital: A Self-Assessment Checklist for Agency Leaders*. Designed to help organizations better align human capital with strategic planning and core business practices, the GAO’s self-assessment framework is organized according to five key elements: (1) strategic planning, (2) organizational alignment, (3) leadership, (4) talent, and (5) performance culture. The GAO framework is shown in Figure 1.1. (U.S. General Accounting Office, 2000). This study framework, however, focuses on only strategic planning, organizational alignment, and talent.

According to the GAO report (2000), *Human Capital: A Self-Assessment Checklist for Agency Leaders*, organizations should develop, implement, and assess all their human capital policies and practices in order to achieve strategic goals. By using the five key areas of the self-assessment framework, an organization can assess its human capital and thereby take the first step toward building a “human capital organization” that focuses on investing in employees and aligning policies and practices to achieve organizational goals (GAO, 2000). For Tate and Klein-Collins (2004), self-assessment is a planning tool given that it is a process through which an organization “identifies specific actions that will lead to the achievement of best practices” (Tate & Klein-Collins, 2004, p. 131).
Figure 1.1. An assessment model for human capital management representing the GAO human capital self-assessment.

The GAO self-assessment tool helps organizational leaders to understand the strengths and weaknesses of their organizations in regard to hiring, retention, promotion, and succession cycle, related performance incentives, and diversity (GAO, 2000). Ritchie and Dale (2000) defined self-assessment as:

A comprehensive, systematic and regular in-house review of an organization’s activities and results [That] allows the organization to discern clearly its strengths and areas in which improvements can be made and culminates in planned improvement actions which are monitored for progress. (p. 241)

In the present study, the GAO’s Human Capital Self-Assessment Checklist framework is used as a guideline for organizational assessment in order to determine how and the extent to which SWP and organizational alignment are perceived as aspects of HCM in ADNOC and its Group of Companies. However, as noted, in this study the researcher
focuses on the three areas of strategic planning, organizational alignment, and talent. Only three areas were selected because the time commitment required of interviewees to respond to questions for all five areas would have been too great. The specific three areas were selected as the most relevant to SWP issues.

Definition of Terms

To help the reader interpret this study’s findings, key concepts and terms are defined as follow:

At-risk occupations: “Occupations where projections indicate the demand for the occupations will decline at a rate greater than normal attrition are potentially ‘at-risk’” (Alaska Department of Administration, 2008, p. 40).

Competitive advantage: “The process by which a firm assesses its position in its niche, compares itself to competitors, and enhances its position by adding more value to suppliers and customers than do its competitors” (Ulrich & Lake, 1990, p. 33).

Emiratization: A strategy intended to reduce the UAE’s heavy reliance on foreign workers by increasing the share and the participation of UAE citizens in a particular sector through a set of policies and laws (Gonzalez, Karoly, Constant, Salem, & Goldman, 2008).

GCC: The Gulf Cooperation Council, which comprises Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (Abdelkarim, 1999).

Human capital management: “An approach to people management that treats it as a high level strategic issue and seeks systemically to analyze, measure and evaluate how people policies and practices create value” (Stiles & Kulvisaechana, 2003, p. 3).
**Labor demand:** The type and number of employees sought by employers (Wilton, 2010).

**Labor supply:** The availability of a workforce in general and of specific types of employees (Wilton, 2010).

**Line manager:** “Someone who is in the direct line or chain of command and has formal authority over people and resources below him [or her]” (Jones & George, 2008, pp. 7–10).

**Organizational alignment:** “The consistency of decisions across functions so that activities and decisions across marketing, operations, HR, and other functions complement and support one another” (Kathuria, Joshi, & Porth, 2007, p. 505).

**Self-assessment:** “A comprehensive, systematic and regular in-house review of an organization’s activities and results [that] allows the organization to discern clearly its strengths and areas in which improvements can be made and culminates in planned improvement actions which are monitored for progress” (Ritchie & Dale, 2000, p. 241).

**Strategy:** “A long-term, directional plan of action” (Bechet, 2008, p. 9).

**Strategic planning:** A methodology used by an organization to determine its future direction and how it plans to achieve its goals (Hewlett, 1999).

**Strategic workforce planning:** “A methodical process of analyzing the current workforce, determining future workforce needs, identifying the gap between the present and future, and implementing solutions so the organization can accomplish its mission, goals and objectives” (Helton & Soubik, 2004, p. 460).
Succession planning: The process an organization uses to plan for the right number and right type of individuals to satisfy the organization’s needs for talent over time (Rothwell, 2005).

Talent: “The resource that includes the potential and realized capacities of individuals and groups and how they are organized, including within the organization and those who might join the organization” (Boudreau & Ramstad, 2007, p. 2).

Chapter Summary

In this chapter, an introduction to this research study, its background, and the problem was provided. The purpose of the study, the research questions, and the significance of the study were discussed. Additionally, the assumptions underlying the research were specified and the limitations and delimitations were described. The chapter also introduced the conceptual framework used to guide this study. Last, key concepts and terms were defined.
Chapter 2

Literature Review

This chapter presents a literature review focusing on several topics related to strategic workforce planning (SWP), i.e., the topics that formed the basis for this study. Topics include definitions of SWP and closely related terms, a brief history of workforce planning and a description of its importance, and an account of the SWP process. This chapter also provides a relatively in-depth look at the UAE’s oil and gas industry. Finally, the Self-Assessment Model for human capital, from the U.S. Government Accountability Office (GAO), is described as the conceptual underpinning for this study.

Strategic Workforce Planning

In the contemporary business world, organizations are striving to manage their workforce strategically in order to keep up with current needs while predicting the nature and impact of future changes and challenges (Brathwaite, 2012). SWP, an aspect of the management of human capital, is one of the most critical functions determining an organization’s performance and sustainability. Ward and Trip (2013) stated that SWP is “a fundamental requirement for survival as an organization. When done well, it provides a competitive advantage. When done poorly, it results in a breakdown of the alignment between objectives and execution” (p. v).

According to Schweyer (2004), “organizations must be strategic about workforce management because the talent they find, attract, develop and retain is in almost every sense their only competitive advantage” (p. 14). Further, “To manage strategically means that traditional HR objectives such as turnover or performance are superseded by organization-wide goals designed to complement a specific business strategy” (Dyer &
Therefore, it is important to design, implement, and monitor a strategic workforce plan in order to guide an organization in relation to how and when to recruit, retain, and appropriately manage high-performing employees. In summary, “workforce planning is the most strategic work human capital can do and if done right, could give human capital the coveted role of strategic business partner” (Hirschman, 2007, p. 1).

**Definition.** A long-standing focal subject in military studies, “strategy” has become a widely used and accepted business concept and subject of analysis (Quintella, 1993). According to Hitt, Ireland, and Hoskisson (2013), “a strategy is an integrated and coordinated set of commitments and actions designed to exploit core competencies and gain competitive advantage” (p. 4). Typically, it refers to “a long-term, directional plan of action” (Bechet, 2008, p. 9). Chandler (1962) defined strategy as “the determination of the basic long-term goals and objectives of an enterprise, and the adoption of courses of action and the allocation of resources necessary for carrying out these goals” (p. x). There is also an important connection between strategy and competitive advantage. In De Kluyver’s view (2000), “strategy is about positioning an organization for a sustainable competitive advantage” (p. 3). Overall, a strategy refers to how an organization will achieve the vision it has established for itself through a set of decisions and actions (Quintella, 1993).

The concept of SWP has been defined in a number of ways. However, most of the definitions refer to a methodology that focuses on an organization’s long-term goals and to the development and implementation of plans to meet these goals (Stonehouse & Pemberton, 2002). The term SWP is used interchangeably with other terms in the literature.
such as workforce planning, strategic staffing, human resource planning, succession planning, manpower planning, and building bench strength (Bechet, 2008; Sinclair, 2004). These concepts connote comprehensive planning for an entire organization’s workforce (Rothwell, 2005) and have one specific objective: “to create a longer-term context within which shorter-term staffing decisions can be made most effectively” (Bechet, 2008, p. 7).

According to Armstrong (2011), “workforce planning (often called human resource planning) is based on the belief that people are an organization’s most important strategic resource” (p. 223). In engaging in a workforce planning effort, an organization “asks how well the collective talents and skills of … [its employees] match up to the strategic plan and objectives” (Rothwell, Alexander, & Bernhard, 2008, p. xi).

SWP is a critical component of and connected with strategic planning efforts. The purpose of strategic planning is to translate an organization’s vision and mission into results by creating and maintaining consistency between the organization’s objectives and resources and its changing opportunities (Wendy, 1997):

Workforce planning naturally complements and is a follow-up to strategic planning. Just as strategic planning helps an organization outline where it is, where it is going, and how it plans to get there, a workforce plan lays out the specific tasks and actions needed to ensure the organization has the necessary human resources to accomplish its mission. (County of Fairfax, 2008, p. 8)

According to Maheshwari (2004), SWP “bridges the gap from where we are to where we want to go” (p. 85). It is a systematic process implemented with the purpose of meeting organizational goals by aligning and integrating strategic planning, workforce management, and budgeting. One of SWP’s specific goals is that of determining the
number of employees required to carry out an organization’s future projects and operations (Bechet, 2008). Choudhury (2007) defined SWP as “a strategic planning process for human resource management … [that] involves taking steps for systematically matching the projected staffing needs of a jurisdiction with the available and emerging employee skills in the labor market” (p. 264). According to Rothwell et al. (2012), SWP requires a comprehensive plan to determine the skills and the number of employees with those skills needed to produce desired business outcomes. Therefore, SWP should start with a clear strategic plan, accurate workforce data, through internal and external environmental scanning, and a keen awareness of trends (Cotten 2007).

**History.** Dating back several decades, SWP is based on the economic theory of supply and demand: as the demand for a product or service grows, the demand for workers to make the product or deliver the service also grows (Rothwell et al., 2012). During World War II, companies in the U.S. were required to develop a workforce plan that included a report of current and future staffing needs and submit it to the World War II Planning Commission (Rothwell et al., 2012). According to Gill (1996), even before the 1960s, SWP was already an important management tool used to balance and structure the skills of the workforce. The Mediterranean Regional Project, introduced by the Organization for Economic Cooperation and Development (OECD) at the beginning of the 1960s, was one of the first workforce planning projects. The main purpose of the project was to identify educational requirements for the next fifteen years and achieve specific targets for economic growth. The project has been conducted in six Mediterranean countries (Greece, Italy, Portugal, Spain, Turkey, and Yugoslavia), and based on its success several other developed and developing countries initiated similar
projects (Willems, 1996). Consequently, at that time the structure of almost every organization included a dedicated talent-management function. In general, too, the 1960s was a reactively stable period in terms of business conditions so that SWP flourished (Rothwell et al., 2012).

By the early 1970s, a rapid transformation was taking place in terms of business conditions. Specifically, changes in technology and the growth of global competition began to impose new demands on companies to develop their workforce and to recruit employees with the necessary skills. In the face of these changes coupled with the time-consuming process of training employees, many organizations experienced an internal shortage of skilled workers that was difficult to overcome. As a result, recruiting firms became popular because their purpose was to provide companies with skilled workers (Rothwell et al., 2012). In addition, many businesses continued to collect labor supply and demand data in order to determine the size of the labor force and the types of skills likely to be required in the future (Hirschman, 2007). A survey of 220 U.S. organizations conducted in 1974 found that most of the organizations surveyed had formally used SWP and that their SWP practices focused almost entirely on supply and demand analysis (Towers, Perrin, Forster, & Crosby, 1971).

Overall, SWP is “a strategy planning process for human resource management” (Choudhury, 2007, p. 264), the purpose of which is to facilitate better operating decisions by enabling an organization to take the following steps: to predict the talent an organization will need to prepare an action plan to close emerging gaps and to avoid problems that may arise in the future (Kirch, 2008; Makridakis & Wheelwright, 1987). A powerful process requires a significant financial and social investment (Leek, 1983). SWP
constitutes an important aspect of the information system necessary for business continuity and uninterrupted access to the resources needed to operate an organization (Colley, 2006). Therefore, SWP should be incorporated into the business strategy of the organization and aligned with the organization’s strategic plan (Bechet, 2008; Cotton, 2007).

**Importance of Strategic Workforce Planning**

A skilled workforce continues to be one of the most valuable resources for organizations and countries alike. However, the acquisition, management, and retention of talent constitute a significant challenge for many organizations. Accordingly, the absence of a qualified workforce can create an insurmountable barrier to organizational improvement and development and consequently to overall economic success (Wellins, Smith, & Erker, 2009). The unpredictability of the business environment means that there is no guarantee that skilled labor will be available as needed. Hence, SWP has become increasingly important to organizations in recent years, due mainly to increased retirements, as well as retention and restructuring initiatives (Melchor, 2013). According to Director and Schramm (2006), an organization runs the risk of wasting recruitment and selection funds if it overestimates the number of employees it will need or if the HR department overestimates its ability to recruit qualified individuals to fill vacant positions. Therefore, SWP that is integrated with broader organizational strategic planning is critical to ensuring that organizations have the right mix of skills and talent to address their current and emerging workforce challenges. An organization’s ability to accurately estimate its future workforce needs can have a major influence on its performance and success. It is critical, therefore, for any organization to determine the size and nature of the workforce needed to achieve long-term goals (Huselid, Becker, & Beatty, 2005). On this basis, the human
resources function must focus on recruiting, developing, motivating, and retaining the workforce required to meet the organization’s evolving needs over time (Director & Schramm, 2006), including ensuring that the right people are hired and that the right employees are in the right positions. Organizations should manage and align their workforce needs with their strategic direction, development, and implementation in order to gain a competitive advantage and thereby fulfill their mission and realize their vision.

SWP is “a management tool that affects the full range of human resource activities including recruitment and selection, classification and compensation, training and development, performance management, and retention” (Minnesota Management and Budget, 2005, ¶ 2). This process helps organizational leaders, employers, and managers make better decisions related to investment in human capital and more effective management of business risks and costs (Freedman, 2009). In a human capital study conducted by the GAO, the researchers found that SWP addresses two acute needs: (1) aligning an organization’s human capital policies and practices with its current and emerging mission and strategic goals and (2) developing long-term strategies to recruit, train, and retain employees to achieve the organization’s strategic goals and mission (GAO, 2003). Linking SWP with the organization’s overall strategy and financial-planning process helps to support the alignment of goals, objectives, and resource allocation (Datz, Hallberg, Harris, Harrison, & Samples, 2012). According to Young (2010), companies that use SWP appropriately can strengthen the processes associated with it by incorporating a wide range of data, merging SWP with other organizational planning processes, and aligning SWP with the organization’s structure and governance processes. In a five-year research study on the effectiveness of SWP in 500 companies over a period of five years,
Thune and House (1970) found that companies with a formal strategic planning system performed better in terms of earning than did companies that lacked a system of this nature. In a 2001 study with a sample of 173 Fortune 500 companies, it was found that organizations involved in SWP performed better than those not involved in SWP (Ogunrinde, 2001). Although SWP may benefit organizations in many more ways than are listed here, in general the process helps organizations to:

- Obtain a clear idea of the workforce needed to achieve the organization’s strategic goals.
- Develop a comprehensive plan of action that will ensure that the right workforce will be available when needed.
- Solve staffing problems related to managing employees’ movement into, within, and out of the organization.
- Manage workforce risks and their impact on implementing strategy implementation.
- Prioritize workforce investments.
- Distribute talent across businesses and geographies.
- Enable the organization to quickly adjust to current and emerging business requirements.
- Prepare a convincing rationale—a business case—for obtaining approvals and requesting resources to implement new policies and programs needed to achieve the organization’s strategic goals. (Emmerichs et al., 2004; Young, 2006)

In essence, SWP is about ensuring that the right people with the right skills are at the right place at the right time in the most efficient and cost-effective way possible.
Meeting this goal on an ongoing basis requires a combination of long-term workforce strategies as well as short-term workforce plans to address critical labor issues and to ensure that future generations are well prepared and equipped with the necessary skills to take on their predecessors’ roles (Bechet, 2008; Miracle, 2004). It is, therefore, necessary to ensure that all an organization’s human capital policies and practices are geared toward supporting its strategic plan and mission.

**Strategic Workforce Planning Process**

In 1967, Eric Vetter published the first book-length discussion of the SWP process for business organizations. He reported the findings of his doctoral dissertation research, surveying practices in a number of leading organizations, most of them in aerospace and engineering fields, and identified four fundamental steps in this process: (1) data collection and analysis resulting in workforce inventories and forecasts, (2) identification of goals and problem solutions, (3) implementation of plans and programs, and (4) program management and evaluation (Ward & Trip, 2013). Although multiple approaches to and models of SWP have been developed by private and public organizations, the processes used in all of these are very similar. For example, in 1999, the Office of Personnel Management (OPM), which leads the U.S. federal government in strategic human capital planning and management, published an SWP model that has been used by many organizations. The model is organized into five key steps and a number of related items intended to link the SWP process with business strategy (Figure 2.1): (1) define the strategic direction (2) identify current and future workforce needs (3) develop an action plan (4) implement an action plan to close any identified gaps and finally (5)
evaluate and adjust the strategy and plan (GAO, 2002b; Riccucci & Naff, 2008). The items involved in each step are as follows:

1. Define the strategic direction
   a. Build and organize strategic partnerships.
   b. Define the mission, visions, values, and objectives.
   c. Review the organizational structure.
   d. Analyze and redesign workflows.
   e. Set measures for organizational performance.
   f. Position HR as an active partner.

2. Identify current and future workforce needs
   a. Analyze the workforce.
   b. Conduct a competency assessment and analysis.
   c. Compare the organization’s workforce needs against available skills.

3. Develop an action plan
   a. Prepare a workforce plan to address skill gaps.
   b. Set specific goals.
   c. Develop policies and practices to support the action plan.

4. Implement the action plan
   a. Communicate the workforce plan.
   b. Gain organizational support.
   c. Conduct recruiting, hiring, and placement.
   d. Modify or reform where needed.
   e. Implement retention strategies.
5. Evaluate and adjust the strategy and plan
   
a. Evaluate successes and failures.

   b. Revise and modify the plan as needed.

   c. Identify new workforce and organization issues.

Figure 2.1. Five-step strategic workforce planning model. Adapted from GAO (2002b), Foreign languages: Human capital approach needed to correct staffing and proficiency shortfalls. Washington, DC: Author.

Following the OPM project, the National Academy of Public Administration (NAPA), an independent organization chartered by Congress and created to improve the performance of governance systems, and the International Personnel Management Association for Human Resources (IPMA-HR), an organization that represents the interests of human resource professionals at the federal, state, and local levels of government, investigated and compared various workforce models used by federal, state, and local governments and industry. The two organizations, concluded that four steps usually form the basis of SWP efforts (GAO, 2003):
1. Examine future organizational, environmental, and other factors that may affect the organization’s ability to accomplish its strategic goals.

2. Define skills and competencies needed in the future workforce to meet the organization’s goals and identify gaps in skills and competencies that an organization needs to address.

3. Develop and implement human capital strategies targeted toward addressing these gaps and issues.

4. Evaluate the effectiveness of the human capital strategies.

In general, “workforce planning models analyze the competencies of the current workforce against anticipated needs to identify gaps” (Ball & Gotsill, 2011, p. 89). The models are designed as a basis for developing strategies to close the identified gaps by placing the right people in the right jobs at the right times, so that organizations can achieve their missions and avoid obstacles (Selden, 2009). In abbreviated form, most organizations follow four fundamental steps in their SWP processes: (1) supply analysis, which describes and analyzes the current and anticipated workforce in terms of total number of positions, composition, and competencies needed; (2) demand analysis, which describes what the workforce should be now and in the future in terms of total number of positions, composition, and competencies needed; (3) gap analysis, which compares demand to supply in order to identify the differences between present and future staffing needs; and (4) solution analysis, through which action plans are developed and implemented to close the most critical gaps between supply and demand (Anderson, 2004; Vernez et al., 2007).
Approaches to SWP tend to vary according to each organization’s specific needs and mission. However, the success of any organization’s SWP process should be judged not by the type of process used but by its outcomes, i.e., whether and the extent to which the process is helping the organization achieve its mission and strategic goals. SWP should be linked to the organizational mission and vision and translated into the organization’s adopted policies, programs, and practices (GAO, 2002). That is, with such a link in place, the success of any SWP effort relies next on effective implementation and deployment (Choudhury, 2007). According to the GAO (2003), SWP will only succeed if senior management establishes the overall direction and goals for the effort and provides vision and stability when developing and implementing the strategic workforce plan. Furthermore, “organizations that start to implement a new strategy must first translate it into a set of goals and objectives. From these goals and objectives they then either develop new or adapt old processes and tasks that produce the desired results” (Tosti, 2007, p. 21).

Developing and implementing an SWP process is the responsibility of “those who define the amount and type of resources that will be needed to implement business strategies and then allocate those resources once they become available. In most companies, line managers play this role” (Bechet, 2008, pp. 165–166). The SWP process should not be separated from other organizational processes. HR staff can play a critical role in supporting the process. In fact, it is responsibility of HR professionals to ensure that line mangers conduct SWP appropriately (Bechet, 2008). In Lawler, Levenson, and Boudreau’s view (2005), “if HR wants to play a strategic role in organizations it needs to
develop its ability to measure how human capital decisions affect the business and how business decisions affect human capital” (p. 27). As stated by Griffin (2005):

Managers now realize that the effectiveness of their HR function has a substantial impact on the bottom-line performance of the firm. Poor human resource planning can result in spurts of hiring followed by layoffs—costly in terms of unemployment compensation payments, training expenses and morale. (p. 438)

SWP can be conducted according to several of the available methods and models, which draw on “quantitatively focused approaches from statistics, econometrics, or operations research and from qualitatively focused approaches to problem solving” (Rothwell et al., 2012, p. 5). Although there are some variations in terminology and the sequence of processes across the models, a key element in any SWP effort is the identification of workforce requirements and the subsequent development of strategies to meet those requirements (Anderson, 2004). Identifying workforce requirements requires evaluating existing work conditions and preparing to meet future challenges and needs. In other words, SWP focuses on anticipating the size of the current labor force and the type of competencies an organization is likely to need to achieve its mission and goals in the future (Ricucci & Naff, 2008). SWP requires forecasting of several variables via both labor demand and labor supply analyses (Gatewood & Gatewood, 1983). According to Director and Schramm (2006), “The accuracy of forecasts [in regard to overall organizational performance or profit] is a function of how accurately firms are able to predict employment gains and employment reductions” (p. 4). Therefore, any approach to SWP will involve estimating labor force requirements, projecting labor force availability, and identifying the gap between demand and supply (Bechet, 2008).
According to Gable (1999), “one of the most common reasons that planning fails is because the process is not supported by key decision makers at the top” (p. 18). Another key factor responsible for failure is poor process (Hardy, 1999). Overall, strategic plans fail for multiple reasons:

- The strategic planning is too complicated.
- The developed plans are not implemented and updated.
- The link between the organizational structure and strategic objectives is not clear.
- The employees are not aligned with the plan.
- The employees do not understand their roles within the plan’s vision.
- The employees in the plan don’t understand which parts of the plan relate to them.
- Planning success isn’t recognized and built on. (Banach, 2001; Getz & Lee, 2011)

In Helton and Soubik’s view (2004), “regardless of the instrument or model used, any workforce planning approach must be flexible and visionary in order to prepare for changing needs and produce meaningful solutions” (p. 473). Integrating workforce-planning strategies with the organization’s core business practices is necessary to ensure organizational success and survival. To succeed in implementing and sustaining SWP, decision-makers and planners should view workforce planning as a business process rather than as an HR process and mandate participation by a recruiting committee or group in the process. Most important is to secure top management support in order to achieve optimum workforce planning results. Decision-makers and planners must begin with a few critical
positions, use technology, and most importantly, review, assess, and update the strategic workforce plan periodically (at least every quarter). Moreover, it is of paramount importance to ensure that strategies are not only initiated, but also sustained (Freedman, 2009). The GAO and a panel from the NAPA suggested a number of strategies to successfully implement SWP (Anderson, 2004):

- Top management must set the overall direction and goals of SWP and provide commitment and support.
- Human resources staff should ensure that information is readily available.
- Employees and other stakeholders should be invited to participate in developing and implementing future workforce strategies.
- A communication strategy should be established to create common expectations, promote transparency, and report progress.
- The SWP effort should be integrated with other kinds of plans in the organization.
- An explicit implementation strategy should be set and followed.

**Human Capital Self-Assessment Checklist Model**

According to Samad (2013), “Human capital has been theoretically and empirically linked to business performance” (p. 393). In the late 1990s, the U.S. federal government acknowledged that, in the midst of advancing technology and an evolving labor market, the performance of federal agencies was lacking and sought to overcome this by improving its human capital management (HCM) strategies and practices. The federal government recognized that federal agencies depend on three elements to achieve the highest level of performance and accountability: human capital, process, and
technology. The most important of these elements is human capital, because an organization’s human capital defines its character and its capacity to perform (GAO, 2000). Strategic HCM focuses on viewing people as assets whose value to an organization can be enhanced through investment and requires SWP to be linked to an organization’s strategic goals (GAO, 2002, 2004).

The Office of Personnel Management (OPM), which leads the government in strategic human capital planning and management, was clearly in need of infrastructure reform (GAO, 2008). The OPM recognized strategic HCM as a high-risk area because federal organizations lacked a strategic approach connecting its HCM effort to their respective missions and strategic goals. Congress also acknowledged that more attention to strategic HCM was needed in federal organizations (GAO, 2009). The placement of HCM as a higher priority within performance-based management models was first reflected in the Government Performance and Results Act (GPRA) of 1993, which set standards for goal setting, for ongoing performance measurement, and for evaluating the achievements of individual federal agencies. The Act required the President to present a federal performance plan in annual budget submissions for the upcoming year (GAO, 2008). Further, due to advances in information and technology processes, economic growth, long-term fiscal constraints, and shifts in workforce demographics, HCM became the focus of performance improvement strategies for the federal government.

In 1999, a discussion draft of its Self-Assessment Checklist for Human Capital was issued and distributed by the GAO as a proposed solution to some of the deficiencies in federal agency human capital management strategies. Based on the collected feedback and views from senior managers and human capital experts and practitioners, the GAO
determined that the “development of systematic national outcome indicators would aid in the assessment of trends, definition of federal objectives, measurement of progress, and effective communication of challenges of the 21st century” (GAO, 2008, p. 2). Further, the GAO urged federal government agency leaders to take practical steps to improve HCM strategies and practices by conducting self-assessments. According to Tate and Klein-Collins (2004), the self-assessment instrument “enables ... professionals to identify potential performance improvement areas. As a planning tool, the self-assessment identifies specific actions that will lead to the achievement of best practices” (p. 131). The instrument provides a basis for “identify[ing] weakness in processes and systemic factors that are responsible for present performance gaps or [that] might prevent the achievement of new strategic goals” (Conti, 1997, p. S13).

In 2000, the GAO published the Human Capital Self-Assessment Checklist for Agency Leaders based primarily on two principles of human capital: investing in the workforce and aligning “people policies” to achieve an organization’s goals. The Human Capital Self-Assessment focuses on investing in individual employees and the agency workforce as whole and determining whether the agency “established, [a] clearly defined, and communicated shared vision (i.e., a mission, a vision for the future, core values, goals and objectives, and strategies) and aligned its resources and systems to support it” (GAO, 2000, p. 4). The GAO has made efforts to improve the Human Capital Self-Assessment Checklist through researching effective strategies and practices designed to directly support an organization’s progress toward fulfilling its missions meeting its strategic goals, and operating according to its core values. Subsequently, efforts to perfect the framework have ensued in the form of investigations into successful HCM strategies
and practices from leading private-and-public sector organizations. Therefore, an organization focused on achieving its strategic goals and thereby gaining a competitive advantage can use the model to research approaches to SWP (GAO, 2002).

The Human Capital Self-Assessment Checklist model presents a conceptual framework to guide SWP and management in the context of modern, progressive HCM strategies within federal agencies. It underlines the importance of HCM and periodic assessments as the fundamental driver of successful performance-based models. Endeavors to recruit and retain the right people for specific competencies in order to achieve the organization’s objectives were rated as extremely important. Inclusiveness and employee empowerment strategies were also deeply ingrained in the human capital assessment model, as recognizing the value of employees was highlighted as the key to the organization’s success or failure (GAO, 2002). The model was designed to help organizational leaders and decision-makers identify the strengths and weaknesses of their current human capital policies and practices. Moreover, its aim was to assist them in addressing any gaps that needed to be addressed within their organizations in order to avoid problems in the future. In summary, it is a diagnostic tool that captures senior leaders’ views of their organization’s human capital policies and practices. It helps organizational leaders and decision-makers make sure that all their human capital policies, programs, and practices are specifically designed and implemented to steer their organizations toward achieving strategic goals.

To identify the common principles underlying the human capital strategies and practices of private-sector organizations, the GAO conducted an intensive review of the human resources literature as well as other published reports and case studies. Useful
information was drawn from a multi-site case study of nine successful firms in the private sector as input for further customizing the federal model for an HCM framework. These firms were recognized in the literature as being most innovative or effective in strategically managing their workforce: Federal Express Corp.; IBM Corp.; Marriott International, Inc.; Merck and Co., Inc.; Motorola, Inc.; Sears, Roebuck and Company; Southwest Airlines Co.; Weyerhaeuser Co.; and Xerox Corp., Document Solutions Group. Each of these firms had implemented human capital strategies and practices to support and achieve their strategic goals and objectives. The interview questions were developed and tested for reliability and validation. Moreover, secondary data such as documents and data obtained from the organizations or that were publicly available (e.g., annual reports, strategic planning documents, human capital policies, and manuals) were also analyzed and used to support the research. The interviews with these nine purposefully selected firms resulted in the identification of 10 fundamental, interrelated tenets of successful HCM:

1. The positioning of HCM as a fundamental component of strategic management planning.
2. The integration of functional human capital staff into leadership teams.
3. The leveraging of internal human resource functions with expertise drawn from external sources.
4. The recruitment of staff members with essential leadership skills that accommodate the organization’s mission and objectives.
5. The effective communication of a shared organizational vision throughout the agency.
6. The recruitment, development, and retention of workers according to specific competencies.

7. The use of performance management systems to establish an interpretable correlation between organizational performance and results.

8. The provision of rewards and employee incentives along with support in order to promote high employee performance.

9. The integration of input from employees into human resources management policies and practices.

10. The measurement of the effectiveness of implemented human resources management strategies through ongoing checks or assessments.

The Human Capital Self-Assessment framework was categorized into five key components (Figure 2.2), each of which includes at least two key questions (Appendix D), to assess an organization’s human capital policies and practices in the respective areas (GAO, 2000):

1. Strategic planning
   A high-performance organization establishes a clear mission, vision for the future, and core values. It sets its goals and objectives and develops appropriate strategies to accomplish the desired results. It also effectively communicates its shared vision with its employees and members.

2. Organizational alignment
   A high-performance organization incorporates its organizational components, practices, core processes, and resources with its core business practices to accomplish its mission and future desired state. It also aligns its entire HCM
systems with its organization’s strategic and program planning. This requires SWP to be linked with the organization’s shared vision.

3. Leadership

A high-performance organization has a committed senior leader who fosters the organization’s shared vision, aligns organizational components, and builds a commitment to the vision at all levels of the organization. The organization must have “a succession planning strategy [to] ensure a sustained commitment and continuity of leadership even as individual leaders arrive or depart.” (GAO, 2000, p. 17)

4. Talent

A high-performance organization acquires and retains competent employees to accomplish its mission. It invests in its workforce through education, training, and opportunities for continued growth. The organization matches the right people to the right jobs. It stays alert to the changing characteristics of the labor environment.

5. Performance culture

A high-performance organization creates a positive and healthy work environment in which employees are empowered and motivated “to contribute to continuous learning and improvement and mission accomplishment” (GAO, 2000, p. 22). The organization has a performance management system under which employees’ performance expectations are aligned with the organization’s mission, and “in which personal accountability for performance is reinforced by both rewards and consequences” (GAO, 2000, p. 22).
Additionally, the organization provides employees with the right technology needed to enable them to perform at a high level.

![Figure 2.2. Five key components of human capital self-assessment. Adapted from GAO (2000), Human capital: A self-assessment checklist for agency leaders. Washington, DC: Author.]

The self-assessment findings were then widely used to evaluate and improve the organizations’ human capital systems. The effort was well received and had a significant impact on the way the federal government began to approach human capital management and the focus of its strategies. The principles outlined by the GAO encourage organizations to place a high value on their employees’ contributions to their success (GAO, 2002). In 2001, HCM was highlighted as an objective in the federal budgeting agenda for the first time by President George Bush (GAO, 2000).

The GAO (2008) asserted that each federal agency should be required to meet certain standards before implementing any future HCM strategies. This method was designed to ensure that each agency would meet the specified conditions of the established infrastructure to include planning processes, the agency’s ability to
implement the HCM system, proof of validated performance management systems, and adequate safeguards. This test would also expose gaps in the current model so that they could be addressed through further research. Further, studies have demonstrated that the Human Capital Self-Assessment Checklist model is effective in developing approaches to SWP based on the needs of organizations. However, the outcomes of the model approach have been positive, although, federal HCM strategies have not been transformed through this effort (GAO, 2002).

**The UAE’s Oil and Gas Industry**

Oil and natural gas represent the backbone of the UAE’s economy. The country has the fifth-largest oil reserve in the world and is the eighth-largest producer of liquid fuel globally. “Under the UAE’s constitution, each emirate controls its own oil production and resource development” (Business Monitor International, 2010, p. 7). The biggest deposits of oil in the country are located in Abu Dhabi, the UAE’s largest emirate and its capital city (Rai & Victor, 2012). Moreover, the country has 3% of the world’s proven gas reserves with nearly 215 trillion cubic feet (Al-Rodhan & Cordesman, 2006). Abu Dhabi controls over 85% of the UAE’s oil production and over 90% of its reserves. In 2009, the oil sector contributed around 29% to the UAE’s GDP (gross domestic product) (United Arab Emirates National Bureau of Statistics, 2010).

Khalifa bin Zayed bin Sultan Al Nahyan, President of the UAE and Ruler of Abu Dhabi, is also Chairman of the Supreme Petroleum Council (SPC) of Abu Dhabi. The SPC creates and oversees the implementation of petroleum policies, whereas the Abu Dhabi National Oil Company (ADNOC) manages and operates all aspects of upstream and downstream processes in the petroleum industry (Butt, 2001). Members of the SPC
act as the board of directors for ADNOC, making the company “a vehicle for an active involvement of the Abu Dhabi government in the emirate’s oil and gas industry, for implementing the government’s oil and gas policy, and also for holding the government’s share in the operating companies and joint ventures” (Rai & Victor, 2012, p. 485).

Abu Dhabi National Oil Company (ADNOC). Established in 1971, ADNOC is a wholly state-owned corporation. The company’s headquarters are located in the Emirate of Abu Dhabi where approximately 95% of the UAE’s oil reserves are located. ADNOC regulates the oil sector in the UAE and is one of the largest and most active energy companies worldwide with more than $28 billion in oil- and gas-related projects (Mirza, 2009; Rai & Victor, 2012). It is one of the best-performing national oil companies worldwide. According to Plunkett (2007), ADNOC is considered one of the most conscientious companies in the Middle East. Its excellent performance is mainly due to the UAE government’s political stability, transparency, and long-term policy guidance (Rai & Victor, 2012). Two aspects of this political organization have proved to be critically important. One is very stable political control, which has allowed the UAE government to make credible long-term decisions for the oil and gas sector, which have greatly alleviated the management task for ADNOC and also minimized the risks of being totally dependent on foreign oil companies. Moreover, internal expertise and foreign business partners have contributed to ADNOC’s success. ADNOC allocates some of its own senior managers and some of the senior managers in its subsidiaries to Western oil companies so that the managers can work alongside with Western employees and obtain the latest information and learn about the most up-to-date technology from them (Rai & Victor, 2012). In the fairly recent past, ADNOC undertook two major organizational restructures, in 1988 and in 1998,
each with the purpose of making ADNOC more agile “in its response to changing market conditions and technologically more capable” (Rai & Victor, 2012, p. 494).

ADNOC operates as a fully integrated system of 16 subsidiaries or Group Companies that perform various upstream and downstream activities in the oil, gas, and petrochemical industries (see ADNOC’s corporate structure in Figure 2.3). ADNOC’s Group Companies are categorized as follows (Abu Dhabi National Oil Company [ADNOC], 2014a; Rai & Victor, 2012):

- **Exploration and production of oil and gas**
  - Abu Dhabi Company for Onshore Oil Operations (ADCO)
  - Abu Dhabi Marine Operating Company (ADMA-OPCO)
  - Zakum Development Company (ZADCO)

- **Exploration and production services**
  - National Drilling Company (NDC)
  - ESNAAD
  - Abu Dhabi Petroleum Ports Operating Company (IRSHAD)

- **Oil processing**
  - Abu Dhabi Oil Refining Company (TAKREER)

- **Gas processing**
  - Abu Dhabi Gas Industries, Ltd. (GASCO)
  - Abu Dhabi Gas Liquefaction Company, Ltd. (ADGAS)
  - Abu Dhabi Gas Development Company, Ltd. (Al HOSN GAS)
  - ADNOC Linde Industrial Gases Company, Ltd. (ELIXIER)
• Chemicals and petrochemicals
  - Ruwais Fertilizer Industries (FERTIL)
  - Abu Dhabi Polymers Company, Ltd. (BORUUGE)
• Maritime transportation
  - Abu Dhabi National Tanker Company (ADNATCO)
  - National Gas Shipping Company (NGSCO)
• Refined products distribution
  - ADNOC Distribution

ADNOC’s main operations are based in the UAE with some joint ventures such as BORUUGE, an international partnership with the Austria-based petrochemical company Borealis (Environment, Health and Safety Division, Supreme Petroleum Council, 2009). ADNOC also has a number of independent companies operating under the direction of the SPC: the Abu Dhabi Oil Company (Japan), Ltd. (ADOC); Bunduq Company, Ltd. (BUNDUQ); and Total Abu Al Bukhoosh (TOTAL-ABK) (ADNOC, 2009).

Human capital challenges. Through Emiratization, i.e., the nationalization of human capital, the UAE government is striving via legislation and regulation both to increase the proportion of UAE nationals in various sectors and to ensure that more UAE nationals are qualified for increasingly significant roles. Further, a related aim is to reduce the UAE’s heavy reliance on foreign employees by employing UAE nationals able to perform the jobs originally held by foreign employees (Gonzalez et al., 2008). However, it will take time for these initiatives to produce tangible results due to several factors, including imbalanced population growth, inadequate educational outcomes, and the mismatch between UAE nationals’ skills and the demands of the labor market (Gardner,
Although a leader in developing indigenous talent, ADNOC and its Group of Companies have not consistently met their Emiratization targets. Instead, ADNOC and its Group of Companies have struggled to recruit talented Emiratis because of the UAE’s small population, high market competition, and insufficient educational outcomes in technical areas. In addition, the companies compete for a small pool of skilled Emirati workers with other local and foreign industries, such as nuclear power, semiconductors, aerospace manufacturing, and renewable energy (Rai & Victor, 2012). Rai and Victor (2012) capture the contradictory nature of the situation in regard to Emiratization and technology that ADNOC faces in advancing its business mission:

ADNOC’s increased emphasis on Emiratization has been difficult to square with the rising technological complexity of its field. Emiratization is a chronic problem that requires long-term investments with uncertain outcomes. The need for much higher technical expertise to manage the country’s maturing field is immediate. (Rai & Victor, 2012, p. 495)

Furthermore, Muysken and Nour (2006) have argued that education in the UAE confronts a number of serious challenges such as poor provisional training, low skill levels, and serious mismatches between skills and employment opportunities. The UAE government and ADNOC are investing heavily in an effort to resolve these problems, but evidently it is not easy task (Rai & Victor, 2012). As Behery (2009) stated, “correcting the imbalance in the
labor market and bringing locals into the workforce in sufficient numbers seems to be a difficult process and it is likely to take a long time” (p. 180).

Figure 2.3 Abu Dhabi National Oil Company (ADNOC) corporate structure.

Contributing to national employment in the oil and gas sector is imperative. As of year-end 2012, the total number of employees in ADNOC and its Group of Companies was over 37,000. UAE nationals who were occupying senior management positions
represented 65% of the entire workforce (323 employees). The remainder of the workforce was recruited from around the world, mainly from Asia, Europe, and other Arab countries. To fulfill its goal of becoming less dependent on outside expertise, ADNOC places a high priority on acquiring and developing local talent. The organization’s target is to achieve 75% Emiratization by the end of 2017 (ADNOC, 2012).

The ADNOC Group National Recruitment Department (GNRD) was established in 1999 with the objective of increasing the proportional representation of UAE nationals in ADNOC and its Group of Companies. Its mission is to provide a suitable candidate for each position (ADNOC, 2011). The GNRD was able to raise the national workforce rate in ADNOC and its Group of Companies from 23% in 1999 to 45.1% in 2009 (Abu Dhabi National Oil Company, 2009). According to ADNOC (2012), “the GNRD applies an efficient strategy in its employment program, which matches the individual’s qualifications with the needs of the Group Company” (p. 65). Further, the department has a strategic workforce plan in place to meet the companies’ need for technical employees (ADNOC, 2014b).

The aging workforce and shortage of UAE national technical talent has led to a long-standing reliance on a foreign workforce at ADNOC and in the UAE as a whole. As a result, ADNOC and its Group of Companies have taken a comprehensive and long-term approach to building the capabilities of their workforce. ADNOC’s strategy to increase its stake in UAE nationals is based on developing in-house technical capability, mostly by preparing Emiratis for various technical positions in ADNOC through several educational programs and academic institutions. These programs and institutions have a two-fold objective: to help Emiratis achieve educational goals and to equip Emiratis with the key
skills to occupy technical positions at various levels in the oil and gas industry. These educational programs and academic institutions include the ADNOC Scholarship program, the ADNOC Technical Institute, the Petroleum Institute, the Achievers Oasis Program, and most recently, the Glenelg School of Abu Dhabi (ADNOC, 2011). Priority for enrollment in these programs and institutions is given to UAE nationals. However, “ADNOC has also learned that it can’t rely on the supply of qualified Emiratis entirely for its workforce [which] made ADNOC extend educational opportunities such as enrollment at the Petroleum Institute beyond UAE nationals” (2012, p. 496). All the students who join ADNOC’s academic institutions and programs are recruited to work at ADNOC and its subsidiary companies upon graduation (Rai & Victor, 2012).

ADNOC and its Group of Companies have shown an outstanding ability to adapt to changing conditions including the growing demands placed on the modern oil and gas industries (Rai & Victor, 2012). According to Davidson (2009), “Abu Dhabi will continue to be a major oil producer and to control the world’s greatest sovereign wealth funds” (p. 59). However, ADNOC faces great challenges in regard to meeting the increasing demand for energy at the same time as the complexity of technology and the expertise needed in its fields are rising. These growing demands require enough workers with the necessary skills to carry out the business plan successfully. Therefore, ADNOC and its Group of Companies need appropriate strategic workforce plans that align with their core business and strategic plans to ensure their competitiveness in the long run. It should be noted here that ADNOC and its Group of Companies are not presently able to proceed on the basis of a body of specific research relevant to their work and context, as there is no research concerning SWP and organizational alignment for this industry in the UAE.
Chapter Summary

Strategic workforce planning is a crucial activity in which organizations engage to ensure a competitive advantage in the market and to prepare to meet future demands. Such planning, when effective, ensures that an organization’s workforce is adequate to its targeted objectives. It involves acquiring and retaining employees with the skills the organization needs to create and retain a workforce of an appropriate size to meet the organization’s needs over time. However, many organizations face challenges in designing and implementing an appropriate strategic workforce plan and determining the size of workforce needed to achieve optimal work outcomes.

The SWP process comprises four major steps: supply analysis, demand analysis, gap analysis, and solution analysis. To better examine and analyze these steps, it is vital for organizational leaders and planners to first understand and be able to describe their organization’s mission, goals, and objectives, as these influence HR and staffing strategies, staffing policies and programs, and staffing system and retention management. Organizational leaders and planners should also ensure that all people policies are aligned with and help to achieve the organization’s strategic goals. SWP is considered a crucial process for ADNOC and its Group of Companies, as they invest heavily in human capital and contribute to the country’s economy. Moreover, the oil and gas reserve is considered one of the region’s most important natural resources and a key driver of the country’s economic development. Therefore, ADNOC and its Group of Companies need appropriate strategic workforce plans aligned with their business direction. These plans must be systematically assessed and updated.
Chapter 3

Methodology

This chapter focuses on the research methodology and design used in this study to explore, describe, and interpret how study participants perceived strategic workforce planning (SWP) and organizational alignment as aspects of HCM in ADNOC and its Group of Companies in the UAE. This chapter restates the problem, the research questions and the conceptual framework for this study. The research design, the case study protocol, the sampling strategies, the data-collection methods including data analysis and validation procedures, the role of the researcher, and ethical considerations are discussed.

The Problem

People are “the most important asset for the growth and sustainability of the organization” (Bhattacharyya, 2014, p. 54). Therefore, policy- and decision-makers and training and development professionals undertake SWP for a number of reasons. Two principal reasons are to ensure that a business’s leaders are making sound operating decisions (Makridakis & Wheelwright, 1987) and to forecast the workforce skills needed to close emerging gaps and avoid potential obstacles (Kirch, 2008). However, most organizations fail to appropriately implement SWP because plans are often both unrealistic and vague, such that targets are not achieved (Bechet, 2008). Further, perceptions of SWP may differ between the directors and the managers of a given organization. However, SWP is imperative for oil and natural gas companies in the UAE, as these resources are considered the most important in the region, contributing significantly to the country’s national income (Rai & Victor, 2012). Accounting for over 30% of national income (Gonzalez et al., 2008), the UAE’s oil and gas companies,
particularly ADNOC and its Group of Companies, need to ensure that their workforce plans are aligned with the organization’s shared vision and integrated with business practices. These plans should be subject to regular assessments and then updated in accord with the results in order to improve organizational performance. Such actions are necessary as Jackson and Schuler (1990) stated “because the purpose of human resource planning is to ensure that the right people are in the right place at the right time, it must be linked with the plans of the total organization” (p. 235). It is imperative for training and development professionals and decision-makers to understand the SWP process and its central role in the achievement of overall organizational goals.

**Research Questions**

The purpose of this study is to explore, describe, and interpret how line managers perceive strategic workforce planning and organizational alignment as aspects of HCM in ADNOC and its Group of Companies in the UAE. To accomplish this, case study interviews were conducted face-to-face at these companies with line managers from various directorates in ADNOC and its Group of Companies. The interviews were developed around the following research questions:

1. What are the perceptions of the line managers at ADNOC and its Group of Companies of their strategic workforce planning in achieving their strategic goals?
2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?
3. How do the line managers at ADNOC and its Group of companies understand and describe talent management in their organization?
Conceptual Framework

This study was guided by the GAO’s Human Capital Self-Assessment model. The model was developed based on two principles that focus on human capital: investing in the workforce and aligning people policies to accomplish the organization’s shared vision. It was designed in order to provide a basis for organizational leaders to identify areas for improvement in their current human capital policies and practices. It focuses the attention of senior leaders on finding ways to better align HCM with strategic planning and core business practices. The Human Capital Self-Assessment instrument consists of five main parts, each of which comprises several elements (GAO, 2000, p. 10):

1. **Strategic planning**: developing the organization’s mission, vision for the future, core values, goals and objectives, and strategies.
2. **Organizational alignment**: integrating human capital strategies with the agency’s core business practices.
3. **Leadership**: fostering a committed leadership team and providing reasonable continuity through succession planning.
4. **Talent**: recruiting, hiring, developing, and retaining employees with the skills to further the mission.
5. **Performance culture**: empowering and motivating employees while ensuring accountability and fairness in the workplace.

This study focuses on three of the five areas selected for their association and interaction with SWP: strategic planning, organizational alignment, and talent. Each area was investigated and explored in-depth in this study using the Human Capital Self-Assessment framework.
Research Design

A qualitative research method (with a single case study design) was selected for this study because this method is appropriate when an improved understanding of a given problem is likely to result in an improved practice (Merriam, 2009). In qualitative research, investigators “study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them” (Denzin & Lincoln, 2005, p. 3). Researchers can use qualitative research methodology for “(a) research that seeks to explore where and why policy and local knowledge and practice are at odds; (b) research on informal and unstructured linkages and processes in organizations; (c) research on real, as opposed to stated, organizational goals; and (d) research that cannot be done experimentally for practical or ethical reasons” (Marshal & Rossman, 2006, p. 53). Therefore, the qualitative research method was the most appropriate method for this study in order to explore the phenomena under investigation and capture participants’ thoughts and feelings in regard to them (Palys, 2008). Figure 3.1 offers an overview of the research methodology used in this study.

A research design is a plan that guides the researcher in the process of collecting, analyzing, and interpreting the phenomena under investigation. According to Yin (2014), “the design is the logical sequence that connects the empirical data to a study’s initial research questions and, ultimately to its conclusions” (p. 28). Its purpose is to help researchers address all the initial questions in a study by linking them to the collected data (Yin, 2014). More specifically, it aims to “understand human experience to reveal both the processes by which people construct meaning about their worlds and to report what those meanings are” (Hull, 1997, p. 14). Yin (2009) identified five elements of
primary importance to case study design: (1) research questions; (2) study propositions, if available; (3) unit of analysis; (4) logic whereby the data are connected to the propositions; and (5) criteria to provide a basis for analyzing the findings. The research questions element outlines the research questions in terms of the “who,” “what,” and “why” of the study. The study propositions outline the phenomena to be examined within the scope of the study. The unit of analysis defines the case investigated and described in the study. Connecting the data to the proposition can be performed in a number of ways

![Diagram of research methodology]

*Figure 3.1. Overview of research methodology.*
such as by “pattern matching, explanation building, time-series analysis, logic models, and cross-case synthesis” (p. 34). The last element, the criteria for analyzing the findings in case study analysis, requires researchers to identify and address rival explanations for their findings.

**Case study.** Given the purpose of this study, the most appropriate method to answer the research questions was case-study qualitative research. Creswell (2007) explained five approaches to conducting research of this nature (Table 3.1), one of which relies on developing an in-depth description and analysis of a single case or multiple cases, i.e., the case study approach. Merriam (2009) defined a case study as “an intensive, holistic description and analysis of a single entity, phenomenon, or social unit” (p. 46). Further, the case study research method is usually associated with a qualitative study and is popular for this purpose in many disciplines. Overall, the case study design provides a sound basis for examining complex phenomena through a detailed contextual analysis (Mulenga, 2001).

Case studies are carried out for a wide range of purposes by researchers from very different disciplinary perspectives. The main purpose of a case study is “to understand one person or situation (or perhaps a very small number) in great depth” (Leedy & Ormrod, 2001, p. 157). According to Creswell (2014), case study research involves investigating an issue through a single case or multiple cases in a given context by drawing information from a variety of data sources: “in case studies, the researcher explores in-depth a program, event, activity, process, or one or more individuals” (Creswell, 2003, p. 15).
## Table 3.1: Approaches to Conducting Qualitative Research

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<th>Grounded Theory</th>
<th>Grounded Theory</th>
<th>Case Study</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approach</strong></td>
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<tr>
<td><strong>Focus</strong></td>
<td>Explore an individual’s life.</td>
<td>Describe an individual’s experience.</td>
<td>Develop a detailed description of a phenomenon in-depth.</td>
<td>Describe a deep understanding of an experience.</td>
<td>Explore an individual’s case or multiple cases.</td>
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<tr>
<td><strong>Design</strong></td>
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<tr>
<td><strong>Methodology</strong></td>
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<tr>
<td><strong>Unit of Analysis</strong></td>
<td>Focus on one or more individuals.</td>
<td>Focus on several individuals who have experienced a phenomenon.</td>
<td>Study a process, action, or interaction involving many individuals.</td>
<td>Study a culture-sharing group.</td>
<td>Study an event, program, activity, or more than one individual.</td>
<td></td>
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<tr>
<td><strong>Data Collection</strong></td>
<td>Use primarily interviews and documents.</td>
<td>Use primarily interviews with 20–60 individuals.</td>
<td>Use primarily observation and interviews.</td>
<td>Use primarily observation and interviews.</td>
<td>Use multiple sources, such as interviews, observations, documents, and artifacts.</td>
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<tr>
<td><strong>Data Analysis</strong></td>
<td>Analyze data for stories, retell stories, develop themes, often using a chronology.</td>
<td>Analyze data for significant statements, meaning units, textural and structural descriptions, i.e., to describe the essence of the experience.</td>
<td>Analyze data through open coding, axial coding, and/or selective coding.</td>
<td>Analyze data by describing the culture-sharing group, including themes related to the group.</td>
<td>Analyze data by describing the case as well as cross-case themes.</td>
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<tr>
<td><strong>Written Report</strong></td>
<td>Develop narrative stories about an individual’s life.</td>
<td>Describe the essence of the experience.</td>
<td>Generate theory illustrated in a figure.</td>
<td>Describe how a culture-sharing group works.</td>
<td>Develop a detailed analysis of one or more cases.</td>
<td></td>
</tr>
<tr>
<td><strong>Discipline Background</strong></td>
<td>Draw from the humanities including anthropology, literature, history, psychology, and sociology.</td>
<td>Draw from phenomenology, interpretive research, and qualitative inquiry.</td>
<td>Grounded theory, descriptive and interpretive.</td>
<td>Phenomenology, interpretive research, and descriptive.</td>
<td>Grounded theory, descriptive and interpretive.</td>
<td></td>
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<tr>
<td><strong>Type of Problem</strong></td>
<td>Need to tell stories about an individual’s experience.</td>
<td>Need to describe the essence of a lived phenomenon.</td>
<td>Need to describe and interpret a phenomenon viewed from the inside.</td>
<td>Need to describe and interpret a phenomenon viewed from the inside.</td>
<td>Need to describe and interpret a phenomenon viewed from the inside.</td>
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</table>

The case study approach can be used for descriptive, exploratory, and/or explanatory purposes (Yin, 2003). This approach is recommended when the researcher seeks to answer “how” or “why” questions, when the researcher has limited control over behavioral events, and when the researcher is primarily interested in a current issue in a real-life context. In addition, Yin discusses the use of a case study design when the “what” questions are exploratory in nature, as is the situation for the present study. Case studies are also a preferred strategy when the researcher seeks to better understand the dynamics behind certain actions given that this design enables multiple methods for data collection and analysis to be used (Yin, 2003). At least six types of data sources are suitable for use in case study research, including “documents, archival records, interviews, direct observation, participant-observation, and physical artifacts” (Yin, 2009, p. 98). Once sufficient relevant data have been collected, then a holistic or embedded analysis can be carried out (Yin, 2012, p. 8), as shown in Figure 3.2.

This present study was exploratory in nature because it investigated a relatively unexplored phenomenon. The study was also descriptive because it described the employees’ perceptions so that the phenomenon could be better understood. According to Rai and Victor (2012):

ADNOC is secretive about its goals, but two seem two seem to dominate. First to be a reliable, controllable source of revenue through the careful (conservative) development of the country’s oil resources ... The second element of ADNOC’s strategy is the one “non-core” area where the company is active: the creation of a qualified, employable Emirati population. (pp. 494–495)
The holistic single case study design selected is, therefore, the most appropriate choice for this research given that the purpose is to gain insight into the line managers’ perceptions of strategic workforce planning, organizational alignment, and talent at selected sites.

**Single case study.** The researcher considered a single case study holistic design to be most appropriate because, in accord with Yin’s (2009) recommendation, decisions regarding which research method to use should take three conditions into account: (a) the type of research questions posed, (b) the degree of control a researcher has over actual behavioral events, and (c) the degree to which the research focuses on contemporary as opposed to historical events. The design for the study represents what Yin calls a single case design. The single case study design used in this investigation is exploratory and descriptive in nature. That is, in this exploratory case study, the research is undertaken with the purpose of achieving a better understanding, gaining new insights, discovering new ideas, and/or increasing knowledge about the focal issue (Burns & Grove, 2005).

The study explores the SWP policies and practices used at the selected site. Descriptive research refers to a non-experimental research design used to study a variable when only a limited conceptual background has been developed on a given aspect of that variable (Roberts & Burke, 1989). A descriptive approach is useful in terms of gathering accurate information to inform perspectives on the investigated phenomenon (Mouton & Marais, 1996). This study describes line managers’ perceptions of the strategic planning, organizational alignment, and talent at their respective companies.
Figure 3.2. Basic types of designs for case studies. Adapted from R. K. Yin (2012), *Applications of case study research* (3rd ed.), Thousand Oaks, CA: Sage (p. 8).
Yin (2003) specified five reasons for selecting the single case study design:

1. The case study is a critical case in assessing a well-formulated theory.
2. The case study is unique or extreme.
3. The case study is a representative or typical case.
4. The case study is revelatory when a researcher gains access to observe or analyze a phenomenon that was previously inaccessible.
5. The case study involves a lengthy observation of an individual or group.

Two of these reasons apply to the present case study: the unique case and the revelatory case. The selected site, ADNOC and its Group of Companies, is unique because these companies have a long-term workforce plan that details the actions to be taken. The companies pay great attention to human capital by investing heavily in education and training, including establishing and maintaining their own academic institutions, such as the Glenelg School of Abu Dhabi, the Petroleum Institute, the ADNOC Technical Institute, and other training and scholarship programs in order to equip their sector with talented employees in the long-term. The case study is also revelatory because of the role of the researcher in this study and his connection to the site. A former employee at the selected site headquarters in Abu Dhabi, the researcher was involved in various training and development programs there and had established a good connection with many of the senior managers. This site provided the opportunity to analyze a phenomenon that had not previously been studied by researchers. Such benefits provided sufficient reasons for using a single case in an effort to answer the research questions guiding this study.
**Unit of analysis.** In qualitative research the unit of analysis is an important part of the design. It reflects the basic definition of the case and relates to the initial research questions and study propositions. Boyatzi (1998) defined the unit of analysis as “the entity on which the interpretation of the study will focus” (p. 62). The unit of analysis used in the present study is a single unit, as shown in Figure 3.2., which “typically allows a researcher to gain deeper information about a single institution” (Savin-Bade & Major, 2013, p. 307). For this study, the unit of analysis is ADNOC and its Group of Companies, and the data were collected through interviews with line managers in these organizations. In Yin’s (2003) view, interviews with people employed by a focal organization can be used as sources of data even though an organization itself constitutes the unit of analysis. Specifically, the researcher collected data directly from the selected line managers at ADNOC and its Group of Companies.

**Case Study Protocol**

According to Yin (2009), a case study protocol is used to identify the essential components in case study research and data analysis in order to collect data appropriately and to render the case study’s results reliable. He stated that, “the protocol is a major way of increasing the reliability of case study research and is intended to guide the investigator in carrying out the data collection from a single-case study” (p. 79). The case study protocol includes a description of any instruments to be used and describes the field procedures and general rules to be followed in order to advance the researcher’s field agenda (Yin, 2009). Following Yin, the researcher developed a case study protocol comprising the purpose of the study, field procedures, case study questions, and a guide for the case study report (Appendix A).
Sampling Strategies

**Purposeful sampling.** Sampling in general refers to how the people who take part in a study are selected, and in the present study, the specific technique of purposeful sampling was used. According to Holloway and Wheeler (2010), qualitative research relies principally on purposive sampling and “is based on the judgment of the researcher” (p 138). Purposeful sampling, as Merriam (2009) described it, “is based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (p. 77). Hence, in purposeful sampling, “the inquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem and central phenomenon in the study” (Creswell, 2007, p. 125). Therefore, the standard used to select participants and sites is whether they are “information-rich.” As Patton (2002) defined the term, “Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the research—thus the term *purposeful sampling*” (p. 46).

Criterion sampling is a subset of purposeful sampling. It involves searching for participants who meet a defined criterion or set of criteria (Palys, 2008). According to Patton (1990), “the logic of criterion sampling is to review and study all cases that meet some predetermined criterion of importance” (p. 176), whereas Marshall and Rossman (2006) considered criterion sampling a way of strengthening the quality of a research study. Therefore, the purposeful sampling strategy (criterion) is most relevant to this study, given that it requires information-rich data. The researcher selected the participants and the site for this study according to preselected criteria relating to the phenomenon of
interest and the research problem (Creswell, 2007). A more detailed account of the method whereby the participants were selected and recruited is given in the Participants’ Selection section.

**Site selection.** Yin (2009) suggested that when selecting a case study the researcher should choose a site with convenient access to data likely to be relevant to the research questions. The selected site for this unique and revelatory case study is ADNOC and its Group of Companies, i.e., ADNOC and 16 subsidiaries, which together employ over 37,000 people (ADNOC, 2012). The largest national oil company in the UAE, ADNOC is recognized as one of the world’s leading companies in its industry. The company’s headquarters are in the Emirate of Abu Dhabi where approximately 95% of the UAE’s oil reserves are located (Rai & Victor, 2012). Further, ADNOC is considered one of the best-managed state oil companies in the Middle East (Jones, Woodward, & Cohen, 2010). In addition, as a former ADNOC employee, the researcher is familiar with the organization’s business and culture and received approval to conduct his study from the company to a great extent on this basis (Appendix F).

**Participant selection.** To ensure that a wide range of perspectives would be represented on the topic under investigation, the researcher used purposeful sampling techniques (criterion based) to select the 10 participants. The researcher, therefore, used the purposeful sampling method to select information-rich cases from which the most information relevant to the study could be collected (Merriam, 2009). Recruited from among the line managers at ADNOC and its Group of Companies, the participants were expected to provide details and insights pertinent to addressing the research questions.
All the sample units, i.e., the participants, for this study were required to meet the following criteria:

1. A minimum of five years’ experience with the same company within ADNOC and its Group of Companies.
2. A minimum of five years’ experience in a managerial position at this company.
3. Knowledge of and experience with SWP.

The researcher requested interviews with 14 line managers from various directorates in these organizations comprising the Strategy and Coordination Directorate, the Human Resources Directorate, and the Administration Directorate. The names and contact information of the line managers who met the sampling criteria were obtained through the Human Resources Directorate and the Scholarship Division in ADNOC’s headquarters. The primary mission of both the Human Resources Directorate and the Scholarship Division is to maximize the percentage of the UAE national workforce employed by ADNOC and its Group of Companies. Further, ADNOC and its Group of Companies have strategic workforce plans in place to meet the companies’ need for technical employees and other employees in at-risk occupations. There is also a comprehensive plan aimed at encouraging and preparing UAE nationals to join their companies (ADNOC, 2014b). The researcher then contacted the 14 nominated line managers who had been identified as meeting the criteria to participate in person or by email or phone to determine whether they were interested in participating in the study. Of these, 10 people responded, all of whom agreed to participate. For every line manager who agreed to participate in the study, the researcher scheduled a 60-minute interview at a location of the participant’s choice. Before each interview began, the researcher
explained the purpose of and methods used for the study to the potential participant who then signed an informed consent release form if he agreed to participate (Appendix E). In addition, at this point, each participant was given an opportunity to ask questions about the study, to address any procedural concerns, and to discuss his role in the study.

Sample size. There are no universally agreed upon guidelines for sample size, i.e., the number of participants, in qualitative studies. In Yin’s (2003) view, in qualitative research, “the typical criteria regarding sample size are irrelevant” (p. 51). However, in qualitative research, a relatively small sample size is preferred when using the case study method because the investigator is seeking a comprehensive description of the focal phenomena (Yin, 2003). In general, sample sizes in qualitative studies are much smaller than those used in quantitative studies, as statistical power is not a concern in the former (Lunenburg & Irby, 2008). In this regard, Creswell (1998) noted that 5–25 participants is the typical range for qualitative research.

According to Patton (1990), “the qualitative research method enables researchers to produce a wealth of detailed information about a much smaller number of people and cases” (p. 14) than is the case with quantitative methodology. He also argued that there are no rules for sample size in qualitative research: “the validity, meaningfulness, and insights generated from qualitative inquiry have more to do with the information richness of the cases selected and the observation/analytical capabilities of the researcher than with sample size” (Patton 2002, p. 245). The sample size for qualitative research depends on the purpose of the research study, the desired knowledge, usefulness, feasibility, and credibility. Nevertheless, the sample size must be sufficient to reach saturation or redundancy (Yin, 2011). Saturation is defined as open code saturation and thematic
prevalence (Guest, Bunce, & Johnson, 2006). The purpose of reaching saturation is to ensure that everything of importance to a given research agenda will emerge from the collected data and the concepts and themes derived from these (Holloway & Wheeler, 2010). According to Glaser (2001):

Saturation is not seeing the same pattern over and over again. It is the conceptualization of comparisons of these incidents which yield different properties of the pattern, until no new properties of the pattern emerge. This yields the conceptual density that when integrated into hypotheses make up the body of the generated grounded theory with theoretical completeness. (p. 191)

The researcher had initially asked for 14 volunteers. However, only 10 people responded, all of whom agreed to participate. The sample for this study, therefore, consisted of 10 line managers from ADNOC and its Group of Companies, determined by the saturation of responses or when the themes and categories became redundant. The depth of the semi-structured in-person interviews allowed for sufficient data to be collected. The researcher determined that saturation had been reached with the completion of the seventh interview. Therefore, a sample size of 10 was sufficient to ensure that most or all of the perceptions likely to be of importance to the research study were included.

**Data Collection**

The researcher was the primary instrument for data collection and analysis in this study (Merriam, 2009). The purpose of collecting data was to gain a deeper understanding of the study topic and to answer the research questions. According to Yin (2009), the qualitative approach relies on several data sources to assemble an information base, which is “a major strength of case study data collection” (Yin, 2009, p. 114).
“Furthermore, the need to use multiple sources of evidence far exceeds that in other research methods” (p. 114). The major data sources for this study included interviews, documents, and archival records in order to establish triangulation, create a case study database, and maintain a record of evidence (Yin, 2009). The principal technique was that of collecting primary data from interviews. The data-collection process was consistent for all the interviewees, i.e., the sample of 10 line managers employed by ADNOC and its Group of Companies. Prior to the data collection, the researcher obtained permission to conduct this study from the Institutional Review Board (IRB) of the Pennsylvania State University’s Office of Research Protections.

**Instrument.** The primary source of data used for this study was an open-ended, face-to-face interview supplemented with documents and archival records used by the participants’ organizations pertaining to strategic workforce planning, organizational alignment, and talent activities. The questions used in the interview guide were adapted from the U.S. Government Accountability Office’s publication, *Human Capital a Self-Assessment Checklist for Agency Leaders* (Appendix D). Before the researcher used the interview guide in the field, it was reviewed by a subject matter expert, specifically a professor of agricultural and extension education (Dr. Edgar P. Yoder). Table 3.2 shows the relationship between each research question and the interview questions. The interview consisted of nine open-ended interview questions focusing on three key areas: strategic workforce planning, organizational alignment, and talent.
Table 3.2  
*Link between Research Questions and Interview Questions*

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Interview Questions</th>
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</thead>
<tbody>
<tr>
<td><strong>1.</strong> What are the perceptions of the line managers at ADNOC and its Group of Companies of their strategic workforce planning in achieving their strategic goals?</td>
<td>1, 2, 3, 5</td>
</tr>
<tr>
<td><strong>2.</strong> How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?</td>
<td>3, 4, 6</td>
</tr>
<tr>
<td><strong>3.</strong> How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?</td>
<td>5, 6, 7, 8, 9</td>
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</table>

**Pilot study.** According to Schreiber (2008), “a pilot study is a small-scale implementation of a larger study or of part of a larger study” (p. 624) that is conducted in order to determine the feasibility of conducting a full study. Maxwell (1996) suggested using a pilot study to determine the concepts used by the participants, to test the research methods, and to ensure that participants are asked the research questions in an appropriate way. Therefore, the interviews were conducted and the data collected for the present study, the interview protocol was piloted with two line managers from ADNOC and its Group of Companies who volunteered to participate in the pilot study. The pilot study participants were not part of the main study. The criteria for selecting the pilot study participants were consistent with those used in the primary study. At the beginning of the pilot study, each participant received a welcome letter (Appendix C) and an informed consent form (Appendix E). The pilot study was conducted using the same process as that used in the primary study to guide the development of relevant lines of questions about
the subjects and issues to be addressed and to address threats to the primary study’s credibility. A nine-question, semi-structured face-to-face interview was used to collect data. The results of the pilot study showed that the interviews would last from 30 to 60 minutes and that the protocol was successful in addressing and exploring the research questions. Therefore, it was not necessary to modify the research questions.

**Interviews.** Interviews provide in-depth information related to participants’ experiences of and viewpoints on a particular subject (Turner, 2010). The interview format is, therefore, considered one of the most important sources of case study information (Yin, 2014). Further, in Patton’s (2002) view, the purpose of the interview process is to provide a way to “enter into the other person’s perspective” (p. 341). Through the process of interviewing, extensive information about a given phenomenon can be gathered on the basis of the interviewees’ beliefs, feelings, perceptions, and current or future directions regarding it.

Interviews, whether structured, semi-structured, or unstructured, can be conducted either face-to-face, by phone, or via other technology. **Structured interviews** consist of the interviewer asking each participant the same set of questions. **Semi-structured interviews** likewise use the same set of questions with each participant but also use open-ended questions and probes to collect further information—the latter of which can take “the form of asking for more details, for clarification, for examples” (Merriam & Tisdell, 2016, p. 122). **Unstructured interviews** do not follow any predetermined structure (Hancock, 2002).

One of this study’s primary data-collection strategies was the use of a semi-structured interview with predetermined open-ended questions and probes to ensure that
participants would provide rich and thick descriptions of the investigated phenomena. According to Cook (2008), a semi-structured interview is often used in qualitative research although it is suitable for data collection in a broader context. The purpose of open-ended questions is to allow participants to freely convey as much information as they wish and to provide researchers with a way to ask follow-up or clarification questions (Yin, 2003). In general, interview questions should be both meaningful and concise; they should not require yes or no answers; and they should not already have answers to choose from (Ferrance, 2000). The goal of the in-depth interviews used in the present study was to ensure broad representation of perspectives on strategic workforce plans, organizational alignment, and talent.

Given that the semi-structured interview format combines structured and unstructured interview methods (Merriam, 2009), the researcher was able to collect detailed information and obtain clarification as necessary (Yin, 2003). The interview questions were divided into three categories—strategic planning, organizational alignment, and talent—each of which included a number of questions related to HCM and workforce planning. The participants were all asked the open-ended questions listed in Appendix D. The questions were organized by topic (i.e., strategic planning, organizational alignment, and talent). Probing questions for each topic were also included in order to obtain clarifications. The researcher made every effort to ensure that the questions were asked in an objective, unbiased way.

When the pilot study was completed, an invitation to participate in a face-to-face interview (Appendix B) as part of the primary study was sent to the employees who met the criteria for the sample. The employees who responded to the invitation then received
an email thanking them for their interest and requesting potential dates and times for a face-to-face interview (Appendix C). Before being interviewed, each of the 10 participants was asked to sign an informed consent form (Appendix E) and the researcher also assured them of confidentiality in the context of the study. Conducted face-to-face and planned ahead of time, most of the interview sessions took place at the participants’ place of work. In-depth, semi-structured interviews allowed direct information about the views of the line managers to be gathered. The interviews were conducted in English, as it is a widely used language in the target organizations and population. A period of 60 minutes was set as the expected maximum duration for each interview. However, the actual interviews lasted approximately 30 to 90 minutes each depending on the length of the participants’ responses. The study was carried out in accord with Willig’s (2013) view whereby “a full analysis of the data” requires that interviews be audio- or video-recorded and transcribed (p. 31). Thus, all the interviews were audio-recorded and transcribed into field notes for analysis and to ensure that the collected information would be both correct and complete. Recording the interviews and having them transcribed increased the accuracy of the data collection. Moreover, the researcher made post-interview notes to assist in monitoring and analyzing the collected information. Permission to record the interviews was obtained from each participant prior to the interview. Two of the people who had at first agreed to participate withdrew from the study upon learning that the interviews would be audio-recorded. On two occasions, the interviewees objected to certain data being audio-recorded, and in response, the researcher paused the recording.
In addition, notes (audit trail-journaling) were taken during the interviews to record responses to specific questions, make note of important findings or observations, and/or provide details for follow-up questions. According to Merriam and Tisdell (2016), “these reflection [notes] might contain insights suggested by the interview; descriptive notes on the behavior, verbal and nonverbal, of the informant; parenthetical thoughts of the researcher; and so on” (p. 131). At the end of each interview, the researcher thanked the participant for participating and explained next steps in regard to how the researcher would correspond with the participant concerning the recorded interview and the final copy of the study. Each interview was transcribed verbatim into documents using Microsoft Word by an independent, professional transcriber. The transcripts were reviewed multiple times by the researcher for accuracy by comparing them with the interview audio-records and field notes. Next, the transcriptions were analyzed and coded in order to identify emergent themes. In cases in which the interviewees did not want part of the conversation to be recorded, the researcher paused the recorder and wrote up detailed notes on the unrecorded parts immediately after the interview. Then, each participant was asked to “member check” the interpretation of the researcher to verify and validate the information. The participants agreed that their perspectives were adequately represented and that the conclusions reached in the final report were credible.

**Documents and archival records data.** Case study research involves collecting data from a wide range of documents for analysis and verifying interview contents. According to Merriam and Tisdell (2016), “documents of all types can help the researcher uncover meaning, develop understanding, and discover insights relevant to the research problem” (p. 189). Further, using multiple data sources improves the quality of
the study and increases the accuracy of the researcher’s interpretations. Documents and archival records are the most frequently used sources in qualitative research (Marshal & Rossman, 2006). They include “printed and other materials relevant to a study topic, including public records, personal documents, popular culture and visual documents, and physical artifacts” (Merriam, 2009, p. 86). Therefore, this study collected multiple sources of data and information from documents and archival records and triangulated the data from the interviews.

*Documents* are a valuable source of data because “they provide the advantage of being in the language and words of the participants, who have usually given thoughtful attention to them” (Creswell, 2005, p. 219). Further, documents can “furnish descriptive information, verify emerging hypotheses, advance new categories and hypotheses, offer historical understanding, [and] track change and development” (Merriam, 2009, p. 155). For case studies, the most important use of documents is to support and supplement evidence from other sources (Yin, 2009). Therefore, during the interviews, each participant was asked to provide any relevant documentation that might include helpful information about the SWP—these were regarded as private records but not as confidential or sensitive. Public records included materials issued by the organization about its achievements in the field of human capital; agendas and minutes from meetings pertaining to workforce planning; documents outlining or reporting on the planning process; or press releases about the process and outcomes; and the final approved strategic workforce plans, as well as websites. The information from these documents was triangulated with data from the interviews.
Archival records are another crucial source of evidence that can be used in conjunction with other data sources to produce and complement this case study (Yin, 2009). Such records are considered reliable and are generally used to maintain the company’s history and for audit purposes (Baskarad, 2014). According to Heck (2006), archival records “include personal records, budget records, pervious survey data, maps, and various organizational charts” (p. 380). It is necessary for researchers to ensure that these records are accurate before using them (Heck, 2006). During the interviews, to advance the research topic and support their statement, the participants provided the researcher with relevant archival records, including census and statistical data, correspondences, organizational charts, and historical data on benefits and compensation packages.

The documents and archival records were useful for tracing the history of the organizations and statements made by key individuals within the organizations. They also served to counteract the biases of the interviews and corroborate information from other sources, thereby providing triangulation in the analysis process (Yin, 2009). Using a content analysis, the researcher reviewed each document and archival records in relation to organization, content, and purpose and in relation to how they supported or contradicted themes and patterns that emerged from the primary data collected during the interviews. A list of some these collected documents and archival data is presented in Appendix G.

Data Analysis

The aim of the analysis process is to transform data into findings (Patton, 2002). According to Creswell (2013), “data analysis in qualitative research consists of preparing
and organizing the data for analysis, then reducing the data into themes through a process of coding and condensing the codes, and finally representing the data in figures, tables or a discussion” (p. 180). In short, data analysis is “the process of making sense out of the data” (Merriam & Tisdell, 2016, p. 202). Therefore, the collected data in this study were analyzed following six steps identified by Creswell (2014): (1) organize and prepare the data for analysis, (2) read through all the data, (3) provide a detailed analysis through a coding-and themes-identification process, (4) categorize the data into codes and themes for analysis, (5) determine how the description and themes will be represented in the study, and finally, (6) interpret the data (Table 3.3.). This approach was used to analyze content, identify important themes and cross-reference resource material that articulated the participants’ perceptions of SWP, organizational alignment, and talent in their respective organizations.

**Content analysis.** The analysis of qualitative data is often referred to as content analysis—i.e., an interpretation and analysis method for any form of communication, but usually for text documents (Marshal & Rossman, 2006). Content analysis “refers to the set of techniques that are used to identity patterns, categories and themes in recorded language” (Waltz, Strickland, & Lenz, 2005, p. 239). This process involves studying and analyzing the frequency of key phrases or set of words in the data in order to provide useful answer to the research questions (Easterby-Smith, Thorp, & Lowe, 2002). For this study, the text originated principally from interviews, documents, and archival data. The collected data were analyzed inductively by following a qualitative content analysis approach with themes used as the unit of analysis.
<table>
<thead>
<tr>
<th>Research Approach</th>
<th>Data Analysis and Representation</th>
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<tr>
<td><strong>Narrative</strong></td>
<td>Manage data:</td>
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<tr>
<td></td>
<td>• Create and organize files for data</td>
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<tr>
<td></td>
<td>Read, memo:</td>
</tr>
<tr>
<td></td>
<td>• Read text and make margin notes from initial codes</td>
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<tr>
<td></td>
<td>Describe:</td>
</tr>
<tr>
<td></td>
<td>• Describe the story or objective set of experiences and place in a chronology</td>
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<tr>
<td></td>
<td>Classify:</td>
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<tr>
<td></td>
<td>• Identify stories and epiphanies, locate contextual materials</td>
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<td></td>
<td>Interpret:</td>
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<tr>
<td></td>
<td>• Interpret the larger meaning of the story</td>
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<td></td>
<td>Present, visualize:</td>
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<tr>
<td></td>
<td>• Present narration focusing on processes, theories, and unique and general features of the life</td>
</tr>
<tr>
<td></td>
<td>• Present a visual model or theory</td>
</tr>
</tbody>
</table>

The intention of using content analysis for this study was to understand and interpret how line managers perceive SWP and organizational alignment as aspects of HCM in ADNOC and its Group of Companies. Therefore, the inclusion of document content analysis allowed for a more detailed examination of the organization’s strategies and processes as well as an opportunity to triangulate the interview data. Triangulation is defined as “a validity procedure where researchers search for convergence among multiple and different sources of information to form themes or categories in a study” (Creswell & Miller, 2000, p. 126). It involves collecting information from different and multiple data sources in order to ensure the quality of a study, reduce researcher bias, and validate the research findings (Creswell, 2014). Table 3.4 illustrates the link between the research questions, the data sources, and the nature of the content that can inform the analysis.

**Coding.** Coding is “the process of defining what the data are about” (Charmaz, 2006, p. 186). Open- and axial-coding techniques were used to organize the data in preparation for analysis (Creswell, 2007; Saldana, 2013). The basic guideline of categorizing is to identify a similar concept or theme from a set of words. The themes that emerged from this process were constantly compared for categories, themes, and sub-themes. It should be noted here that “a theme is an outcome of coding, categorization, and analytic reflection, not something that is, in itself, coded” (Saldana, 2013, p. 175).

Figure 3.3 presents the framework for the coding technique used in this study. Overall, the process for the present study was as follows:

The researcher begins with open coding, coding the data for its major categories of information. From this coding, axial coding emerges in which the researcher identifies one open coding category to focus on (called the “core” phenomenon),
and then goes back to the data and creates categories around this core phenomenon. (Creswell, 2007, p. 64)

Therefore, the collected data from the interviews, documents, and archival records were reviewed numerous times in order to identify similar characteristics and to ensure a complete analysis. The data were coded and analyzed for recurring keywords, phrases, patterns, and themes, and then organized into categories. Next, the categories were assigned specific codes to each item (chunk) of data, which were used to create the study’s coding system (Creswell, 2007; Merriam, 1998). According to White and Marsh (2006), chunks of data need to be “broken into units for sampling, collecting, and analysis and reporting” (p. 29). In addition, the researcher ensured saturation in line with this definition: “a category is saturated when no new information seems to emerge during coding, that is, when no new properties, dimensions, conditions, actions/interactions, or consequences are seen in the data” (Strauss & Corbin, 1998, p. 136).

Table 3.4
Link Between Research Issues and Data Sources

<table>
<thead>
<tr>
<th>Research questions</th>
<th>Some related SWP and organizational alignment concerns</th>
<th>Content Analyses</th>
<th>Nature of content of data collection unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What are the perceptions of the line managers at ADNOC and its Groups of Companies of their strategic workforce planning in achieving their strategic goals?</td>
<td>Vision and mission, Strategic plan, Size of labor force, Career development programs, Performance assessment, Accomplishments</td>
<td>Interviews, Documents, Archival data</td>
<td>Perceptions, Experiences, Practices, Policies, Programs</td>
</tr>
<tr>
<td>2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?</td>
<td>Corporate policies, procedures, programs, Organizational alignment</td>
<td>Interviews, Documents</td>
<td>Perceptions, Experiences, Practices, Policies</td>
</tr>
<tr>
<td>3. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?</td>
<td>HRM policies, procedures, programs, Performance assessment</td>
<td>Interviews, Documents, Archival data</td>
<td>Perceptions, Policies, Practices, Programs</td>
</tr>
</tbody>
</table>
Validity and Reliability

Validity and reliability are high priorities in all research. Validity refers to notions of accuracy and truthfulness in research results, whereas reliability refers to the possibility of repeating the experiments and thereby gaining the same results (Savin-Bade & Major, 2013). The “goal of [ensuring] reliability is to minimize the errors and biases in a study” (Yin, 2003, p. 37). Therefore, several strategies were used to ensure the validity and reliability of the data collection and analysis in the present study. Creswell (2014) sets out eight procedures to enhance the validity of qualitative findings: (1) triangulate, i.e., use multiple and different data sources, methods, and theories to create themes and support the study; (2) use thematic member checking to determine the accuracy of the findings by asking participants for their feedback on the accuracy of any final report; (3) provide rich and thorough descriptions to explicitly convey findings; (4) clarify any bias that the researcher may bring to the study; (5) discuss both negative and positive information in the study, even if it does not align with the themes; (6) spend significant time on the site to engage and observe the field and the participants in order to gain their trust, become familiar with the culture, and check for any misinformation; (7) use peer review or debriefing to ensure consistency and validity in the coding and themes; and (8) have an external auditor examine both the process and the findings of the study. Creswell suggested that qualitative researchers use at least two of these eight procedures in any given study.

Therefore, to enhance the validity, reliability, and objectivity of the qualitative research and gain an in-depth understanding of the phenomenon under investigation, a number of procedures were used in this study. For triangulation, data were collected in
multiple ways, including by conducting individual interviews, undertaking document analysis, and retrieving archival data, in order to support the validity of the study findings by gaining additional perspectives on the data and the analysis. These data sources were compared with the interview results as well as among those sources. For the member checks, each participant reviewed the researcher’s interpretations of his interview and provided further comments and clarification to ensure that his ideas were represented accurately (Baxter & Jack, 2008). For the audit trail, the researcher kept audio-recorded interviews and transcripts together with a reflective journal outlining the research steps and describing the study as it evolved. For the rich and thorough description, the researcher collected rich and in-depth descriptions of the investigated phenomenon via the participants’ accounts of their experiences recorded in interviews and documents.

In addition, for the peer review, a process was followed to ensure the reliability and validity of the coding and themes. Two researchers were consulted in the role of peer reviewers to further enhance triangulation, to review the coding process and codes, and to validate the findings. The peer reviewers were both subject matter experts (SME) with a background in academic research and each held an academic position at Penn State University: Dr. Meshal Algharaib, a faculty member in the College of Earth and Mineral Sciences, drew on his extensive experience in the oil and gas field in the Middle East, and Dr. Edgar P. Yoder, a faculty member in the College of Agricultural Sciences, drew on his extensive knowledge of research methodologies. In addition, both peer reviewers were well versed in data analysis, and they were asked to review and comment on the results of the data analysis of this study. Themes and concepts were shared with them and their comments were reviewed and discussed for clarity and consensus.
Figure 3.3. Framework for qualitative information reduction. Adapted from J. Saldana (2013), The coding manual for qualitative researchers (2nd ed.). Thousand Oaks, CA: Sage.
The reviewers generally agreed with the researcher’s alignment of the coded data, analysis, and conclusions, but recommended minor modifications to some of the themes. The peer reviewers or the researcher provided support for the theme in question and if both did not agree on its relevance, the theme was removed or replaced.

Further, the data were validated using two methods suggested by Maxwell (1992): descriptive validity and interpretive validity. Descriptive validity refers to the accuracy of the events, objects, behaviors, processes, and other information recorded in the research. Interpretive validity refers to the accuracy of the participants’ accounts of the phenomenon under investigation—in this study, line managers’ perceptions of SWP and organizational alignment.

**The Role of the Researcher**

The researcher is the key instrument for data collection and analysis in a process that is inductive and yields rich descriptions as the end result (Merriam, 2009). The researcher collects information from respondents via open-ended questions and combines (codes) data with the principal intention of developing themes from the collected data (Creswell, 2014)—an endeavor in which the researcher draws on his/her own expert knowledge (Yin, 2009).

The selected site for this case study was the researcher’s former employer, ADNOC, a company for which the researcher had worked for almost seven years. During his employment, the researcher worked in the scholarship department where he was responsible for managing various academic programs designed to recruit and develop talent and to address the workforce needs of ADNOC and its Group of Companies. He also served on several committees focused on workforce planning strategies for the organization. In addition, the researcher was familiar with some of the participants in this
study, given that he had prior professional relationships with them. This prior familiarity helped him to gain the interviewees’ trust, which is necessary when conducting case study research. Therefore, the researcher brought a depth of knowledge of the subject under study and had direct access to the participants’ perspectives. He was positioned to ask relevant questions in an in-depth and nuanced way based on the participants’ responses.

**Ethical Considerations**

“In any qualitative study, ethical issues relating to protection of the participants are of concern” (Merriam & Tisdell, 2016, p. 187). Therefore, approval for this study was obtained from the IRB at Penn State before the study commenced (IRB approval #45568). The IRB “provide[s] an independent review of ethical considerations related to a study and the protection of ‘human subjects’ or respondents, as well as the communities or other settings in which the research will be conducted” (Schensul, 2012, pp. 97–98). The pre-constructed questions used in this study were submitted to the IRB for review, and the interviews with the participants were then scheduled in order to collect detailed information in a confidential way. Given that a single case study design was used, it was critical to ensure that the participants’ identities were protected and that the participants understood and were comfortable with how the collected information would be disseminated. Therefore, an informed consent form (Appendix E) was developed to guarantee that the participants’ identities would be protected. Each participant signed this form before being interviewed by the researcher.

All the interviews were recorded using a digital audio recorder and then transcribed into a written format so that themes could be determined. The researcher also shared a summary of the information and an interpretation of it with the respective
participant to confirm its accuracy. The participants were assigned pseudonyms, and all personal identifiers were removed from the interviews to ensure confidentiality. Further, the researcher assured the participants that no identifying information would be shared with anyone who was not directly involved in the study. In order to protect the human subjects involved in this study, the individual identities of the interview subjects were held in the strictest confidence by the researcher. Access to the raw data was secured in a password-protected computer and limited to the researcher and committee members only. All hard-copy documents, archival data, notes, electronic files, and digitally recorded data will be destroyed three years after the completion of the study.

**Chapter Summary**

In this chapter, the research methods and processes used to meet the goals and thereby fulfill the purpose of this qualitative case study were discussed. The research problem, research questions, and conceptual framework guiding the study were all restated. The purpose of this study was to explore, describe, and interpret how line managers perceived SWP and organizational alignment as aspects of human capital management at ADNOC and its Group of Companies in the UAE. The research methodology detailing the design and sampling strategy, the data-collection methods and instruments, the data analysis, validity and reliability, the role of the researcher, and ethical considerations were explained in this chapter. Chapter 4 presents the findings from the data collection and analysis.
Chapter 4

Study Results

This chapter presents the findings and interpretations based on data collected from semi-structured face-to-face interviews with line managers from the Abu Dhabi National Oil Company (ADNOC) and its Group of Companies and an examination of documents and archival records such as company publications, memoranda, letters, employee handbooks, magazines, reports, charts, and websites. A brief review of the presented study including the purpose, research questions, and research methods opens the chapter. The results pertinent to each research question follow with a description of the issues and themes that emerged from an analysis of the data. Finally, a summary of the results is presented for each question.

Review of the Study

As noted, the purpose of this case study was to focus on qualitative findings in order to gain an in-depth understanding of how SWP and organizational alignment are perceived as aspects of human capital management by line managers in ADNOC and its Group of Companies. Thus, this study was designed to clarify issues relevant to SWP and organizational alignment from an organizational standpoint through the lens provided by line managers.

To explore and interpret issues related to the purpose of this research study, a qualitative single case study was conducted with data collected primarily from interviews and triangulated with company documents and archival records. The selected subject, ADNOC and its Group of Companies, is unique because these companies each have a long-term workforce plan designed to guide business development. These companies pay
great attention to human capital by investing heavily in education, training, and professional development. ADNOC is a wholly state-owned corporation of the United Arab Emirates (UAE). The company’s headquarters are located in the Emirate of Abu Dhabi, the capital of the UAE, where approximately 95% of the UAE’s oil reserves are located. ADNOC regulates the oil sector in the country and is considered one of the largest and most active energy companies worldwide. It is also considered one of the best-performing national oil companies globally (Mirza, 2009; Rai & Victor, 2012). ADNOC manages most of Abu Dhabi’s oil and gas business through a network of 16 subsidiaries that perform a broad range of upstream and downstream activities in the oil, gas, and petrochemical industries as well as providing crude oil and gas transport and services.

The researcher asked for 14 volunteers, and in response 10 employees volunteered. Yet, saturation was achieved, as of the 10 volunteers who did participate, the last three did not provide any new information. Therefore, a sample size of 10 was sufficient to ensure that most or all of the perceptions likely to be representative and, therefore, important would be covered in the study. The 10 line managers were selected from ADNOC and its Group of Companies to participate in semi-structured, face-to-face interviews. To qualify for the study, volunteers were required to have a minimum of five years’ experience in a managerial position with the same company as well as a minimum of five years’ experience in SWP. The names and contact information of employees who met the sampling criteria were obtained from ADNOC’s Human Resources Directorate and Scholarship Division. The participants were contacted and interviews were scheduled after IRB approval had been given. The participants represented various directorates and divisions across the companies: the Strategy and Coordination Directorate, the Human
Resources Directorate, the Administration Directorate, the Human Capability Directorate, the Human Resource Planning and Recruitment Division, and the Scholarship Division.

A pilot study was completed before the case study following the same process as that eventually used in the latter in order to develop relevant lines of questions about the issues under consideration and to address threats to the case study’s validity. The results of the pilot study showed that the interview protocol provided a successful way to address the research questions. That is, in the pilot (and then later in the case study), the semi-structured-interview approach coupled with a uniform set of open-ended questions enabled the researcher to gain in-depth information and perspectives from the participants. The actual interview sessions took place at the discretion of the participant, whether the location was at the participant’s office at work or elsewhere. All 10 participants (100%) agreed to participate in the study, and each signed a consent form before taking part in an interview. All the interviews were digitally recorded and transcribed verbatim. The interviews varied in length from 30 to 90 minutes, depending on the length of the participants’ responses. Based on open and analytical coding of the interview transcripts, documents, and archival records, nine main themes emerged based on the participants’ answers to the questions:

1. What are the perceptions of the line managers at ADNOC and its Groups of Companies of their strategic workforce planning in achieving their strategic goals?
2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment of strategic workforce planning?
3. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?
Each participant was asked nine set interview questions (Appendix D), each of which was connected to one or more of the three research questions: Research Question 1 was answered through interview questions 1, 2, 3, and 5; Research Question 2 through Interview Questions 3, 4, and 6; Research Question 3 through Interview Questions 5, 6, 7, 8, and 9 (Table 3.2). During the interviews, the participants provided the researcher with relevant secondary and archival data to advance the research topic and support their statements. These collected data were triangulated using interviews, documents, and archival records and examined using content analysis to find themes and patterns in the data. The data collected for this study and interpretations based on them were sent to the participants, who were asked to respond to these in order to determine whether the findings and interpretations were plausible. All the participants agreed that their perspectives had been accurately and adequately represented and that they considered the conclusions presented in the final report to be credible.

**Research Findings**

This section presents the findings of the thematic analysis of the participants’ interviews. All the quotations are verbatim with minor adjustments for readability and clarity reflected in [ ], and key phrases are highlighted in bold to indicate coding concepts. In addition, where a company is alluded to directly or information that could be used to identify the company is given, xxx is used to protect the company’s name and to indicate that this is the case. To protect the participants’ privacy and ensure confidentiality, pseudonyms were substituted for the participants’ names and all personal identifiers were removed from the data. The themes were sorted based on questions pertaining to SWP and organizational alignment. The conceptual framework guided the coding, analysis, and organization of the data based on the research questions. Nine main themes emerged
from the interviews: (1) defining and communicating a shared vision; (2) nationalizing human capital (Emiratization); (3) integrating and aligning policies and practices; (4) identifying current and future workforce needs; (5) promoting engagement and collaboration; (6) evaluating and benchmarking; (7) recruiting and hiring strategies; (8) investing in education, training, and professional development; and (9) offering attractive compensation and benefits. These themes are reported as discrete; however, there is some overlap of content between them. Moreover, the participants’ responses to the interview questions often tackled more than one theme. In those cases, the interview data are described in the category emphasized in the participant’s response. Finally, two subject matter experts discussed and reviewed the emergent findings and themes. The themes developed to categorize the data are presented in Table 4.1.

Table 4.1

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1. Defining and communicating a shared vision</td>
</tr>
<tr>
<td>1</td>
<td>2. Nationalizing human capital strategy (Emiratization)</td>
</tr>
<tr>
<td>1</td>
<td>3. Evaluating and benchmarking</td>
</tr>
<tr>
<td>2</td>
<td>4. Integrating and aligning policies and practices</td>
</tr>
<tr>
<td>2</td>
<td>5. Identifying current and future workforce needs</td>
</tr>
<tr>
<td>2</td>
<td>6. Promoting engagement and collaboration</td>
</tr>
<tr>
<td>3</td>
<td>7. Recruiting and hiring strategies</td>
</tr>
<tr>
<td>3</td>
<td>8. Investing in education, training, and professional development</td>
</tr>
<tr>
<td>3</td>
<td>9. Offering attractive compensation and benefits</td>
</tr>
</tbody>
</table>
Research Question 1

What are the perceptions of the line managers at ADNOC and its Group of Companies of their organizational strategic workforce planning in achieving their strategic goals?

This research question was designed to explore and understand the perceptions of line managers in ADNOC and its Group of Companies in terms of how the organization communicates and defines the relevance of its shared vision to all its employees. A further purpose of this research question was to find out how the participants viewed the human capital strategy their organization was using to achieve its shared vision and integrate this strategy with the organization’s overall SWP. Three themes were identified under Research Question 1: defining and communicating a shared vision, nationalizing human capital strategy (Emiratization), and evaluating and benchmarking.

Theme 1: Defining and Communicating a Shared Vision

According to the GAO (2000) “High-performance organizations begin by defining what they want to accomplish and what kind of organization they want to be” (p. 13). Eight of the ten participants (80%) indicated that their organization has clearly communicated and reinforced the relevance of its shared vision to all the employees. The organization holds regular meetings with key members from the directorates and divisions to ensure that the organization’s vision, mission, and strategy are well communicated and shared with everyone in the organization. Further, the organization also uses various means to communicate its vision and strategic plan, such as posters, internal correspondence, an electronic system, committees and teams, and workshops. On these points, some representative statements from the participants are as follows:

Participant 1: Our company xxx [is] an oil company. They **clearly identified and defined the vision**, and it’s shared among all directorates and divisions and even up to down to mid-management and departments.
Participant 2: The company follows a **formal process in communicating** the high-level strategy, mission, visions, and core values of the employees. These are **well documented and well communicated** through a formal process using the company intranet and emphasized frequently in all occasions, meetings, and gathering events through the year mostly through the **official structured formal meetings** such as the board meeting, the shareholders meeting, the technical committee meetings, the project management meetings, the performance review meetings, the strategy review meetings, the annual operating plan, and budgeting meetings every year.

Participant 3: Well, the company **sets the mission, vision, and value**. The logic behind this all is to guide the company where we are going to be in the future and the long future, and then after they design the vision they have the mission, what we are supposed to do, and then the core value that all the employees need to work through these values.

Participant 4: Since we are investing millions of dollars in developing the UAE Nationals and recruiting students to study abroad and within the UAE. So we have **an appropriate plan and a very clear plan of our requirement[s] for the next five years**. So we follow our plan.

Participant 5: The overall strategy comes from our shareholders, primarily ADNOC. When that vision is clarified, then we, as xxx and the leadership team, **we hold an annual workshop to align ourselves and to develop our five-year business plan** to meet the strategies developed by the shareholders.

Participant 6: All of the operating companies in the group have a **five-year rolling plan**. A key component to that five-year rolling business plan is the people component and that five-year rolling plan is updated annually. So its **annually updated**, and out of that five-year plan, we get projects on what skills requirements are going to be needed in order to meet capital and operating projects.

Participant 7: **We have got a long-term business plan** where we talk about our future investments and also the areas that we would like to actually enhance our plans and continuous improvement, market penetration, new market studies, and all that. We also have our **tactical and short-term plan** like our annual business cycle. So, today, when we put our annual business plan, we used the balanced scorecard where we actually identify the key performance indicators, and that is **cascaded down from the top level all the way to the individual level and all our processes are aligned towards that**. So, individual performance contribution actually is aligned with the performance goal of the company.

Participant 7 added: In summary, **all of the employees get this direction**, our business is based on this and the way we **make sure that this strategy is implemented** is through our annual business planning and also strategic business
So we have got a long-term business plan where we talk about our future investments and also the areas that we would like to actually enhance our plans and continuous improvement, market penetration, new market studies and all that.

Participant 8: Vision and mission in xxx of this is well-defined actually. It’s cascaded to everybody but unfortunately … [it does] not reach everyone. Whenever you visit any xxx sites, you will see … posted the vision and mission clearly mentioned everywhere. It varies from division to division. If you go to important divisions like business support, HR, everybody knows what’s the mission and vision. But if you go to the site, not everyone is aware of the vision and mission of the company.

Participant 9: The organization [vision] is defined and communicated in the corporate level and linked in the business plan, economical opportunity, talent strategy, the Emiratization and future assets. And this is to improve the undertaking and the process is expected to provide the HR leverage to communication, share human capital strategy and management issues more effectively.

Participant 10: To the best of my knowledge at the moment, xxx doesn’t have an integrated vision. It is in the process of defining a long-term strategy and that long-term strategy will be creating the form of vision, mission, values components that basically you are talking about in your question.

Most of the participants indicated that the organization has a clearly defined vision that it communicates well to its employees. Participant 2 said that the organization follows a formal process to communicate its strategy and vision, including regular formal meetings with key individuals from the directorates and divisions. Moreover, participants 5 and 6 mentioned that the organization has a five-year strategic plan focused on HCM, which is reviewed and updated annually. Participants 4 and 7 also indicated that the organization allocates a budget to invest in enhancing and executing the long-term business plan.

Only two participants (20%) expressed concerns about the effectiveness of the communication and implementation strategies at their organizations. Participant 8 stated that although the organization has a shared vision that is well defined, it is not clearly
communicated to everyone in the organization. In particular, communications do not extend well to employees working at remote sites. Additionally, Participant 10 expressed the opinion that the organization does not yet have an integrated vision, but is in the process of defining its strategic plan and creating its vision, mission, and values. Further, the collected documents shown that the organization’s vision and mission are well documented and shared among all employees through the company’s website, the employee handbook, and other outlets.

**Theme 2: Nationalizing Human Capital Strategy (Emiratization)**

The organization places great importance on nationalizing its human capital (Emiratization), regarding this as a top priority and a fundamental aspect of its SWP. Emiratization or nationalization is an initiative launched and strongly promoted by the UAE government with the goal of increasing the participation of UAE nationals in the workplace, employing UAE nationals in increasingly significant roles, and most importantly reducing the UAE’s heavy reliance on foreign workers. In short, it is a strategy that focuses on recruiting and developing UAE nationals to improve their employability, thus reducing the country’s high reliance on a foreign workforce (Dale, 2004). Therefore, the primary aim of ADNOC and its Group of Companies is to increase the percentage of UAE nationals in their organizations and to achieve 75% Emiratization by the end of 2017. Evidently, all the participants were aware of the current and targeted Emiratization ratio at their organizations and ADNOC’s goal in this area. On these points, some representative statements from the participants are as follows:

*Participant 1:* I would say that the **Emiratization in the oil and gas sector is considered to be the first priority**, and we have a vision to have 75% Emiratization by end of 2017. And, this vision [is] cascaded down to a strategic plan, which is to have a 5 years’ business plan to recruit yearly 4,000, as an example, to reach this percentage of Emiratization.
Participant 2: There are no restrictions or difficult rules or difficult criteria sort of speaking for screening and pre-screening the candidate[s] [UAE nationals]. As much as give the opportunity generously and hire as much as graduates from different resources considering the limited supply and considering the reality of [the] UAE national population, [the] demography of the country being limited compared to the expatriates. And, all of this done to effectively and positively contribute towards achieving [a] high percentage of nationalization at the end of the road, and the idea goes around: “Hire people and then develop them.”

Participant 3: [The] recruitment [department] can’t recruit anything from their own expectation, perspectives. They need to go with the strategy of the company. For example, let’s say we have now [the] “ABSHER Project,” one of the biggest Nationalization [Emiratization programs]. So the strategy goes through this ABSHER and through the nationalization. When we do the training, we do the theme. We have to see the vision. We have to see the mission. And, this training … [has] to be aligned with the vision and mission.

Participant 4: We have in xxx a vision of Emiratization within … five years. We have to reach the 75% of our workforce to be UAE nationals, which … will be difficult due to the small pool of UAE nationals comparing with many non-UAE nationals hosts living in UAE.

Participant 5: We also have another strategy, which is to increase our national workforce and that is to support our nationalization strategy and our social responsibility aspect or responsibility in this.

Participant 6: We have a very young national group, and we have a large number of managers who are about to retire. So we have to attract these people [UAE nationals] in, and we need to provide them with facilities that allow them to work. But culturally it has been quite difficult for ladies to work in many of our field areas, … either because of family requirements or their own religious requirements.

Participant 7: Part of our people strategy is the Emiratization strategy. We actually have a 2017 Emiratization strategy. Yesterday, we celebrated a milestone where 75% of our leadership team are Emirates nationals in the production company. And, overall, [in] the two companies, 85% are UAE nationals of the leadership team.

Participant 8: We know almost for … at least 5–10 years what we are going to do, things that come like, you know, as urgent but this is not the [norm]. The norm is that we work based on the operations plans, and we have, like, Emiratization plans, we have now based on the manpower plan.
Participant 9: The core concern is to contact a talent opportunity, focus, and remain on achieving the Emiratization [of] 75% by 2017.

Participant 10: There is an element of [the] UAE nationalization rate, the percentage of Emiratization we have in the company. So that is a key part of it [the strategic workforce planning process]. From there, then we are cascading into the admin group, the balanced scorecard. Then we have the planning process for each element.

All 10 participants (100%) explicitly recognized the nationalization strategy of their organizations. They indicated that Emiratization is a top priority and a critical element of the organization’s vision and strategic workforce plan. All were aware of the percentage of Emiratization the organization is planning to achieve by 2017. Participant 2 noted that relaxed criteria and rules for hiring UAE nationals are in place in order to speed up the organization’s progress in terms of fulfilling its strategic workforce plan, specifically in regard to Emiratization. Participants 3 and 5 stated that the organization has a number of programs designed to support the nationalization process. Additionally, Participant 8 indicated that the organization is preparing UAE nationals to take leadership positions. Participants 4, 6, and 9 did, however, refer to some challenges likely to hinder efforts to achieve the Emiratization ratio such as cultural barriers and the UAE’s small population.

The importance of nationalizing the organization’s human capital was clearly mentioned in the secondary data including the archival records collected. Correspondence and annual reports also revealed that the organization pays considerable attention to the Emiratization process and progress. Further, committees are formed and regular meetings are held to follow up and discuss performance.
**Theme 3: Evaluating and Benchmarking**

According to the participants, the organization has established measures that provide relevant data on human capital policies and practices in order to achieve its strategic goals. The organization continually reviews and evaluates its strategic workforce plan and processes in order to determine whether revisions are needed. Moreover, the organization benchmarks its human capital data against the data of high-performance organizations in the local market and recognizes the challenges to overcome and the flexible strategies it can use to do so. On these points, some representative statements from the participants are as follows:

*Participant 1:* We established something that we call … “Camps Programs.” This is a quality assurance program for all engineers to be, to attract them to come and join [the company].

*Participant 2:* In developing the strategy whether the short-term or long-term strategy, one of the prerequisites and step[s] is to review and evaluate the current situations. Looking at the challenges and opportunities, looking at the limitations and what could be the solutions to address these limitations, looking at the current business requirements and consider[ing] the business requirements of [the] future based on the company’s objectives and targets and strategies and what the decision-makers and leaders of the company want to achieve in the coming 5 years or 15 years or the long-term basis like … 25 years.

*Participant 3:* We have the balanced scorecard, we have the matrix, KPI. So it kind of identifies the progress of this and overall performance of the company in term[s] of financial and in term[s] of the goals even in term[s] of the image. Image plays a big part in economic[s].

*Participant 4:* The xxx director of general, last year he formulated a new committee called a steering committee [and it] is our vision or mission where we would like to be in 2030. So at the time being, among the oil companies, we are considered number 20 and our mission [is] to be rank[ed] in the next 20 years to be rank[ed] number 1. So here we have different requirements in order to meet the 2030 vision.

*Participant 4 added:* The company, they treat us very fairly. They are doing a benchmark with the market every five years to find out where we are located. Are we still within the market or behind the market? So, the policy and
compensation division, they are all … to make sure that we are at a level of income for the employees [that] is equivalent with or within the markets.

Participant 5: We use an ADNOC group standard for assuring the competence of the young engineers, and that is systematically deployed across the facilities. There are KPIs attached to that, and there are monthly reports that we have to issue indicating the integrity of the process and how is it implemented and deployed across the divisions. There are red flags, what we call them, when there are issues that people development is not matching the speed it has to go with or there are competence gaps.

Participant 6: Well, again, largely through those groups that we have talked [about] already, and we have groups who look at what the policies we are applying at the moment and how can we enhance those. And, how it feeds up with the long-term strategy objectives it feeds back down to work teams that we run cross group to address these things.

Participant 7: Today, when we put our annual business plan, we used the balanced scorecard where we actually identify the key performance indicators, and that is cascaded down from the top level all the way to the individual level and all our processes are aligned towards that. So, individual performance contribution actually is aligned with the performance goal of the company.

Participant 8: We have the CAMPS, the competency assessment program, we have also something called CSM, which is for the lower junior levels. We have our own programs. All of these people who are enrolled in these programs to support the functions, different functions, in the company.

Participant 9: The key components of our strategy in the human capital strategy are organization performance, plan, and budgeted outlines. This is the most important thing when we look at the organization level, plus market-driven impact in the human capital need.

Participant 9 added: So it is very important that you have your KPIs, or sometimes you call it the balanced scorecard, so to know your measurement.

Participant 10: So everything is performance-driven here…. we have four categories. The Category (A), which comes from the company balanced scorecard results…. Then, we have the Category (B), which is basically your divisional scorecard results. Then, we have the Category (C), which talks about your day-to-day responsibilities, …the KPIs, what I’m supposed to deliver for this one year. Then we have the Category (D), which is very important. And, this Category (D) is coming from these four values. So I assess my employees and my manager assesses me based on these four [the organization’s] values.
All 10 of the participants (100%) indicated that the organization uses several performance management tools—such as SWOT analysis, balanced scorecards, key performance indicators, and a competency assessment program—to evaluate the organization’s and employees’ performance and to ensure organizational development and success. According to Participant 7, the organization utilizes these performance metrics to determine whether its employees’ performance aligns with the organization’s performance goals and annual business plan. Moreover, Participants 4, 8, 9, and 10 emphasized that the organization is performance- and market-driven. It evaluates and adjusts policies, practices, and compensation in order to compete with the local market for talent and to support the organization’s overall SWP. Participant 4 supported this sentiment by stating that ADNOC and its Group of Companies benchmark with the market every five years to ensure that their employees’ compensation and benefits are competitive.

The documents and archival records show that ADNOC and its Group of Companies have evaluated and compared their human capital policies and practices against other organizations in the region. As a result, several proposals and revisions were made to their human capital policies and compensation and benefits packages to attract talent and compete with the local market. Descriptive information about the organization’s competency assessment program and employee performance evaluation procedures were also found in documents shared with directorates and divisions.
Research Question 2

How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?

According to the U.S. Government Accountability Office (2000), “High-performance organizations choose the best strategies for integrating their organizational components, activities, core processes, and resources to support mission accomplishment” (p. 15). Such organizations align their HCM systems with their SWP in order to maximize value and manage risk (GAO, 2000). For this reason, Research Questions 2 was designed to enable the researcher to investigate how the participants perceive the specific SWP that their organization uses to identify its workforce needs and align policies and practices to pursue a shared vision. Based on the interview data, three themes were identified under Research Question 2: integrating and aligning policies and practices, identifying current and future workforce needs, and promoting engagement and collaboration.

Theme 4: Integrating and Aligning Policies and Practices

A high-performance organization uses the best strategies to integrate its organizational components, policies, practices, core processes, and resources in order to achieve its strategic goal. Moreover, an organization of this nature matches its HCM systems with its strategic and program planning. Most of the participants indicated that their organization has coherent human capital policies and practices that contribute effectively to the shared vision. These policies and practices are coherent and well integrated to support and achieve the organization’s vision and mission. The participants also explained that policies and practices are reviewed constantly and revised as necessary to serve strategic workforce needs. They emphasized that the organization’s
policies and practices focus on retaining and developing its workforce. On these points, some representative statements from the participants are as follows:

Participant 1: If we are talking about the practices, policies, and the way of implementations, we always review and study the current situations and we see does the policy support and help? If it is, okay we will drive it in this way. Otherwise, we will review it so many times to make sure it will not be a conflict or interrupt[ing] our main vision.

Participant 2: Well, at least [the] strategic objective of the company is to be a performance-driven organization. And, towards this vision the structure, policy, and processes [are] revisited, revised, and developed in order to ensure that these aligned with what the company want[s] to achieve in terms of a performance-driven organization. And, ensure that all these structures, policy and processes will contribute in accelerating the company efforts and investment towards the objective of being [a] performance-driven organization.

Participant 3: Without the policy, we can’t move forward. For example, anything needs to have [a] policy. Without policy, you can’t work, [for example] in terms of entitlements, who deserve[s] and who doesn’t, what is the policy for promotion, what is the policy for transfer, what the policy for talent[ed] people who want to draw their career plan. So there is a policy that limited us in the company.

Participant 4: We don’t have a clear policy for who graduate[s] with [a] Ph.D. to be recruited in the company with a certain grade. In the past years, only we consider the bachelor degree with certain grades as an entry point. But with the requirement and the needs, we suggested to the management to have an attractive package and job grade for the Ph.D. even what as I mentioned earlier about who will graduate with SJD [The Doctor of Juridical Science] and internal audit how we can retain this investment to stay with the company.

Participant 5: The change and the HR policy now is becoming toward retaining our people, ensuring that their competence is maintained because while you’re in [the] project phase, it’s easy for people to stay because they see growth opportunities. Today, we have become a stable organization. I think the biggest factor that impacted our policy is, we realized, as a company, that moving forward, managing our workforce and retaining them is the biggest challenge. And, therefore, the HR function[ed] has been transformed. We call ourselves now human capability.

Participant 6: Now there are a number of policies and procedures which are being set up and a number of the functions to basically collect the requirements for the business and seek to address these requirements.
Participant 7: Let me get to this point actually on creating a human capital strategy with the policies and that is actually an enabler to push the company’s vision and overall strategic planning. **We have got a very coherent strategy in terms of human capital, which … actually goes hand in hand with our business strategy.**

Participant 8: **We have policies and procedures set.** Of course, we don’t always stick to the same rules, like we have exceptions we make sometimes. And, **we are flexible with people and their situations they face.** We always try to help. Our company, they have … we have [an] open-door policy.

Participant 8 added: Plus, **our policies and procedures, which are very clearly set** when HR could be involved. For example, what is the role of the line management versus the role of the HR. And, this is there and written and distributed everywhere and available in several pages … and hard copies, and available everywhere.

Participant 9: We have a very aggressive what we call it corporate policies, which is **cascaded down to each organization[s]**, very **heavily reviewed every two years to make sure that we are within the market.** So all these, as I told you, [are] conducted with third party or individual or within the group. So all these practices … make sure that we have best practices or best policies to retain our talent.

Participant 10: The main strategy here is what we need to have a robust organizational capability. In order to have a robust organizational capability, you **need to have a policy and program and strategy that attracts and retains and keep[s] the people with you.** So when we say ourselves as a best employer, we always say that a best employer … when the employee joins the company, he never leaves the company. He stays there for 15 years or 20 years. So our policies, the procedures are like our reward policy, the reward philosophy, the compensation philosophy, the competency stuff, we have, the performance systems, we have. **All these policies and processes are mostly market-driven.**

Participant 10 added: I also need to ensure that when I make my policy of procedures, I’m fully aware of the local policies and procedures of that country. So when I make a policy for a Lebanon transport, I should ensure that $130 is mandatory for every employer in Lebanon to give to the employee, $130 U.S. dollar[s] per month to travel from home to the office.

The study found that 9 participants (90%) indicated that the organization has coherent human capital policies and practices that are integrated and aligned to support the organization’s shared vision. Participant 7 articulated this sentiment by stating that **“We have got a very coherent strategy in terms of human capital, which … actually goes**
hand in hand with our business strategy.” Participants 1, 2, 9, and 10 indicated that all the organization’s policies and practices are market-driven and carefully reviewed, revised, and developed in order to support and accelerate progress toward realizing the organization’s vision. Participant 10 also noted that the organization ensures that it engages in benchmarking its policies and procedures against those in the local market. Moreover, Participant 8 indicated that the organization is flexible and lenient with some of its policies pertaining to the employees’ personal needs and situations. Participants 5 and 10 highlighted the importance of having policies and programs that help to attract and retain talent. Only Participant 4 (10%) expressed the view that some of the policies pertaining to new hires with a specific academic degree needed to be clearer and better defined.

The study also found that ADNOC and its Group of Companies’ human capital policies are well communicated and documented in several forms. Some of these policies are available on the organization’s websites and in its brochures and employee handbooks. A detailed version of the human capital policies was found in the company’s HR manual and other new policies were found in memorandums and archival records. The organization’s human capital policies and practices seem to support the organization’s business strategy through focusing on competencies and performance. They are integrated and linked with other organizational procedures such as recruitment and retention procedures; promotion; training and development programs; and expansion projects.

**Theme 5: Identifying Current and Future Workforce Needs**

An organization’s ability to analyze its current workforce and accurately estimate its future workforce needs can have a significant influence on its performance and success.
It is critical for any organization is to determine the number and type of employees it needs to successfully operate and achieve its short- and long-term goals (Huselid, Becker, & Beatty 2005). According to our analysis of the collected data, ADNOC and its Group of Companies utilize multiple tools and strategies to identify their current and future workforce needs. Moreover, they have developed their own collaborative software system to share data among directorates and divisions in order to accurately estimate and determine workforce needs. On these points, some representative statements from the participants are as follows:

*Participant 1:* Actually, we have something, we call it [the] “Equation Formula Emiratization.” This is how we identify the percentage of the Emiratization. Total manpower divided by UAE nationals, times hundred gives you the current percentage and then we got the approved positions from each ADNOC Group of Companies to know their standing and percentage of Emiratization. And, we based on this identifying the requirements they need to reach the percentage of 75 by [the] end of 2017.

*Participant 1 added:* As an example, to reach this percentage of Emiratization, my department role is handling this target cascaded even down to the head of employment, head of planning. And, we are running as we … are recruiting 3,000 plus. We identified the areas that, from the suppliers, that we need from institutes, universities as the projection what we call it as “market supply.” And, we have our own supply, which is the xxx supply.

*Participant 2:* Well, my comment is particularly in terms of alignment and integration. Although we have the well-established processes, mechanism, and different tools that would normally reinforce the alignment and integration among different functions and departments and disciplines and projects in the organization. The challenges will remain in how effectively we communicate, cascade the information, and how effectively we use these tools to ensure the consistency in our efforts and dedication towards achieving the objectives and these key strategic targets.

*Participant 3:* Usually, the HR makes all the planning. They do the planning: how many people are going to be absorbed next year, what kind of projects. But … this company is different. The responsibilities [are] in both sides. Projects people, who work on projects, know how many they are going to handle for the upcoming years, and based on the projects they calculate how many power they want in term[s] of professions, in term[s] of labor. After they have the full plan, they go and submit it to the HR Planning, and then, therefore, they
sit together and discuss and agree on how much manpower they need for the upcoming projects.

**Participant 4:** [The Group Companies] provide us with their needs for the next five years including their new projects and need for new manpower. By that way, the manpower planning provide[s] us with their vision or requirement for the next five years.

**Participant 4 added:** Actually [for] the manpower planning, they initiate software. We call it a dashboard. Through the dashboard, [the HR Directorates] can easily have access to the Group of Companies even the ADNOC itself organization chart to find out [the] number of the active employees, number of the employees even by gender, and who will nearly reach the retirement age.

**Participant 5:** We know by now if we’re taking a gas-processing train that will process X amount of gas and will utilize X number of equipment. Then, the number of people required to operate is that much. We also use some manpower indexes just to validate our requirement, and we employ [an] external consultant to give us international benchmarks.

**Participant 6:** In terms of meeting business need, each operating company needs to identify its own business requirements in terms of people and resources to pursue the goals that are set by these operating companies, which are done in [a] balanced scorecard format. Okay, at xxx, there is not a balanced scorecard yet, but again I think that is now will hopefully come from the long-term[s] strategy and give us a common set of overriding goals that will reflect what is happening in the operating companies.

**Participant 7:** We have got the annual and the long-term workforce planning where HR is the leader. And, the second thing is that all these plans are aligned closely with the business strategy. The third thing is that we also developed the policies and the processes and tools, and also the automated tools and dashboards and the technology to enforce this.

**Participant 8:** Our plan in workforce manpower planning according to the expansion come[s] to us from ADNOC or other contractors, from the ADCO, ZADCO, or ADMA. And then based on this, we plan our activities, recruitments, UAE national intake program, special program, extension program and develop our current workforce to take higher positions. And, of course, we have the support division in the office, [which] is different and depends on the expansion.

**Participant 9:** The methods applied … the staffing models are used for manpower planning. The studies are consistently carried out on a change pattern, trends, and maximum of the workforce. Business line operational aspects are closely coordinated. Today, my business plan … when I talk about specific strategy workforce, the business line, he has to share his vision with me.
So I know what his expectation [is] to grow for the five years … five coming years.

*Participant 10:* We have two kinds of workforce planning. I can say three, yeah. One is we have long-term people strategies. So we have one side, as a long-term business plan people strategy, this is one. And, then, second, we have to validate those data to verify whether we need more people or less people or what kind of a caliber we need. Then, we have the annual manpower planning exercise. And, then, third one is also any time people can go to the HR, to the organization saying that I need more people because of the technology change, because of this. And, sometimes, people will come and say that we don’t need the job more also.

In regard to assessing current and future workforce needs, most of the participants noted that each business line and operating company identifies and projects its own workforce needs and communicates this information so that to HR can provide the right people in the right number with the right kind of qualifications. The participants indicated that HR plays a critical role in supporting the organization’s SWP and supplying the organization with the required workforce. Participants 4 and 7 noted that the organization utilizes collaborative software and technology to share limited data pertaining to employees, such as the present number of employees, their gender, and employees approaching retirement, among other concerned divisions and departments in order to develop appropriate SWP. Participants 1, 5, 6, and 9 identified the metrics and models that the organization uses to identify current and future workforce needs: The Equation Formula Emiratization, manpower indexes, balanced scorecard, and staffing models. Moreover, Participant 5 stated that the organization had “learned over the years how to estimate the workforce requirements depending on the size and the complexity of the production units.” On the other hand, only one participant (10%) expressed concerns about the effectiveness of the communication within the organization, the appropriate use of assessment tools, and the organization’s dedication to achieving its objectives.
Evidence from the secondary and archival data revealed that the HR Directorate communicates with all directorates and divisions to learn about their human capital needs and coordinate with the GNRD and the Scholarship Division to meet these demands. No descriptive information or formal step-by-step procedure was found in the documents on how the organization identifies its current and future workforce needs. The organization provides access to the HR online system and shares the number of vacant positions and disciplines with all directorates in order to aid them in identifying and communicating their workforce needs.

Theme 6: Promoting Engagement and Collaboration

Engagement and collaboration between different entities and departments within an organization lead to better decision-making, organizational alignment, performance, and business outcomes. All 10 participants (100%) indicated that their organizations involve them in the SWP process and empower them to make decisions. The participants reported playing a role in various organizational meetings pertaining to human capital strategies, that the organization encouraged them to share their suggestions and ideas through an internal online system, that they worked in different teams and with different departments, and that they collaborated with other academic institutes to supply them with talent. On these points, some representative statements from the participants are as follows:

*Participant 1:* We all together with the VP’s, HR, and all [the] ADNOC Group of Companies, *we prepare our plan,* succession planning, and *we do best of practices* [and] *we share it among all [the] ADNOC Group of Companies.* We are having four … each quarter we meet as [an] HR forum. This is a high level above ADNOC and its Group of Companies. *We use all things that can help us support our main vision.*

*Participant 2:* The company management has inspired the key executive leaders and human resources division leaders to act as strategic partner[s]
with the line managers in providing the right technical and operation support. Human Resources Management has been mandated to be transformed to be a real change agent, leadership champion, Emiratization champion, and effective service provider and demonstrate a strategic partnership with the stakeholders and other line management in the operation and technical field.

Participant 2 added: In addition to the very specialized leadership development programs and the full engagement and participation of the employees and nationals and all key activities and projects in the organization that’s been geared toward the achieving the shared vision.

Participant 3: So in this case, the HR reviews the business plan. They understand how we are going to expand, how we are going to get our resources. Therefore, when we receive their plan, we review it. And, we are making sure that this is aligned with our vision. That will help us to achieve our vision or to move forward to achieve our vision. Otherwise, it will be some rejection or it will be some negotiation. Why [do] you need this? Why don’t we have this? HR is not only to implement. There is a consultation, let’s say.

Participant 4: Actually, we have a good synergy in between the xxx [Division] and the xxx [Division]. The reason or the main reason, why they have to rely and even us we have to trust their information, [is] for one simple reason: once the student graduate[s], we send him to the manpower planning. And, they will, as a part of their role, they need to recruit him or to send him to the slot being reserved for him earlier.

Participant 5: We also employ an online system that’s [a] more defined version of what used to be the suggestion scheme. We call that the “Idea Oasis” that is open to all employees in the company…. And, if they come up with a resolution, there is a reward attached to that, to all of them who will be engaged. That’s how the HR makes sure the company workforce being expert or not expert, are engaged.

Participant 6: There is a quarterly learning and development forum. The HR forum got all of the HR senior managers from across the company together. The learning and development forum does the same, brings all of the key[s] learning and development mangers and head office support together. And, through those mechanisms, we will identify priorities … to be worked on and where policies … need to be implemented.

Participant 7: We are also introducing our employees suggestions scheme where we call “My Idea,” that is actually a scheme that actually even an employee get[s] as a cash award for the ideas that they contribute to the company.

Participant 7 added: We conduct productivity analysis and make sure that people are engaged. So we have got our engagement survey. Every two years, we use a third party actually to get a fair opinion.
Participant 8: We have a lot of involvement with line management. We require lots of things from them to act as a proper line management of the company, and we have our own role, which is clearly define[d] … in our documentation.

Participant 9: Because our business is so unique and the competition[s] in the oil and gas industry is very huge. So it puts you in positions where you need to make a partnership, make a strategy with your partner. You have to sign [an] MOU with universities, with academic counselors. You need to sign MOUs with the government. So what is your strategy? You need to align yourself. So you need to make sure that all this alignment is there.

Participant 10: We follow here the employee engagement model called “Say, Stay and Strive,” which is called “Triple S.” How much employees are talking positive about xxx? “Say,” whenever there is an opportunity, how much continuously they’re talking about xxx positively? Then “Stay,” how much they’re talking … they want to stay in this company even though … a lot of opportunities are available in the market for their talent, how much interest[s] they have to stay in this company. And, then, the third element … “Strive,” how much they are taking extra effort[s], how much work is motivating them on a day-to-day basis.

Participants 1 and 3 indicated that they collaborate with personnel at all management levels within the organization as well as with the ADNOC Group of Companies to determine workforce requirements. They hold frequent meetings to share data and best practices and to engage in SWP. Participant 2 noted that the organization also urges its organizational leaders to act as strategic partners with line managers and provide them with the support they need to realize the organization’s mission, vision, and objectives. Participant 8 supported this sentiment by saying that “We have a lot of interactions, communication, we rely on each other so it’s not like [other divisions] are upper-hand or we are upper-hand. It’s also like we work as partners actually.” Participant 4 echoed this point by noting that a good synergy exists between his division and other divisions in the organization. In addition, Participant 10 explained that the organization follows an employee engagement model called “Say, Stay, and Strive.” Participants 5 and 7 noted that the organization has an online system through which employees can share
their ideas and comments and even receive rewards when one of their suggestions is adopted. Participants 7 and 10 indicated that the employees feel engaged and the organization evaluates the level of employee engagement every two years through a third party. Participant 10 supported this sentiment by saying, “I’m empowered and I’m participating [in] a lot of management strategic planning meetings.” Moreover, Participant 9 articulated the view that the organization has partnerships with many government and private entities in order to recruit and develop a workforce capable of fulfilling its business requirements and supporting its vision.

The documents indicated that ADNOC and its Group of Companies have formed many committees for different assignments such as the National Recruitment Committee to achieve its Emiratization target and the Corniche Club Committee to organize events and sports activities for employees and their families. The members of these committees represent senior managers from various directorates, divisions, and subsidiaries. Moreover, the documents revealed that the divisions and departments hold meetings to share their expertise and discuss common concerns. Nevertheless, several Memorandum of Understanding (MoU) agreements have been signed with many entities for the purposes of academic cooperation, workforce supply, and exchange of expertise.

**Research Question 3**

How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?

According to Brathwaite (2012), today, more than ever, it is necessary for organizations to manage their workforce strategically in order to keep up with current needs and to predict the impact of future developments. Organizations must acquire and retain competent employees to fulfill strategic goals and then invest in their workforce
through education, training, and opportunities for continued growth. Moreover, it is of
great importance to match the right people to the right jobs and to stay alert to the
changing characteristics of the labor environment (GAO, 2000). The purpose of this
research question was to determine the participants’ perceptions of how ADNOC and its
Group of Companies manage employee talent in order to meet strategic goals. Three
themes were identified under Research Question 3: recruiting and hiring strategies;
investing in education, training, and professional development; and offering attractive
compensation and benefits.

**Theme 7: Recruiting and Hiring Strategies**

game has changed dramatically. It’s no longer about selecting the best person from a long
line of candidates; it’s about going out and finding great candidates” (p. 13). The
recruiting and hiring strategy theme describes various strategies and tools that the
organization uses to attract and retain high-quality talent, especially in regard to UAE
nationals. Among the essential management practices mentioned in the interviews are
participating in career fairs, re-hiring former employees, taking referrals from employees,
outsourcing, making inside hires, and taking walk-ins. Furthermore, the organization has
taken the important strategic step of establishing its own academic institutes in order to
supply its companies with the technical workforce they need. On these points, some
representative statements from the participants are as follows:

*Participant 1:* We also participate in more than 15 **career fairs** across all [the]
ADNOC Group of Companies to make sure that we are in the right track and we
can provide a good supply [of employees] to all [the] ADNOC Group of
Companies.
Participant 1 added: We have our own Petroleum Institute, we have our ADNOC Technical Institute. They are even supplying us with the graduates. Those … fill the requirements of [the] ADNOC Group of Companies.

Participant 2: Well, considering the limited supply of graduates particularly in technical field[s], engineers. The company tends to hire graduates from different disciplines including the technical and operational field from all available local and overseas resources in addition to whoever [is] being sponsored and … [supported by a] scholarship to meet and fulfill current and future demands. The company’s strategy is to hire and then develop and train in order to enable those graduates to cope with the job requirements even in complex technical jobs specifically related to the oil industry.

Participant 3: We negotiate the vacancies and even sometimes not the only way to fill the vacancies by bringing people from the outside of the company…. There is a career plan so we can move, we can transfer, we can promote. We can promote these people to the higher positions where they can contribute and give more to the company as [a] reward.

Participant 3 added: We do outsource specially with the labor[s], plus cooperate with the agents here in UAE, nonprofit, UAE national organization and the newspapers, Internet, some of the other sites. There are lots of sites for recruitment[s]. We list our vacancies, but as I mentioned the competencies-based interview.

Participant 4: We have a plan doing campaigning for recruiting students through visiting them in the universities, abroad whether the US or any countries. And within UAE …we are signing MOUs with the universities. So by signing the Memorandum of Understanding, we can secure or the universities provid[s] us with the list of their students and when they are expecting to graduate.

Participant 5: Before we proceed with the recruitment, we go back and look at our existing people and revise their packages so that we avoid bringing people with a higher pay than the existing people and that is to ensure that we do not have demotivated people.

Participant 6: It is important that we have a linkage back to our education providers in order to look at how we acquire the right talent with the right skills to be available at the right time to meet our five-year projections. And, that part of the linkage, I think, is something that I would say we have got to work on more.

Participant 6 added: One of the challenges that we see coming into talent management, for example, is how we can enhance our talent acquisition process because there are a number of different bodies such as GNRD [Group National Recruitment Department], our manpower planning and recruitment, our PI [Petroleum Institute], our ATI [ADNOC Technical Institute], our scholarship department and the operating companies’ own
requirements. And, probably from your experience in the scholarships, you know that sometimes those projections well, what one projects today [and] what one gets tomorrow, how the two match is probably not perfect. And, there is more work needs to be done in order to make that alignment more effective.

Participant 7: Each position in the company has [a] competency profile. Those profiles are used for selection[s], so we only select the people who actually measured out to be in those behaviors….We conduct psychometric testing actually to gauge if the employee is actually fit for the role that they are applying for, for certain positions. And, also, we have got a workplace sample test actually to make sure that the person possesses … for the technical and behavioral [qualities needed for] and the leadership positions.

Participant 7 added: Another sourcing strategy is rehiring our ex-employees…. And, we also convert some of our contractors into direct hire[s] … and for the short-term employment, we rely on third-party contractors where we have got agreements with them to fill the gaps of leave replacements, and shutdowns, and the turnovers.

Participant 8: We use the Internet, we use direct CVs, referrals from people. Anyone in the company can send a CV. We don’t have problem with people, actually, we reward if we have [a] good resource from someone, we reward him for that….We actually hire the family members from the currently working people who have long service.

Participant 9: We participate in exhibitions. We sign MOUs with anybody, universities, academic. With the schools, we [even] go beyond that. We go to the fourth grade. We sign a contract with them. We provide them with a salary to study science. We go in what we call it career fairs…. We go to the universities, colleges. We support them by sponsoring some programs, events related to engineers. We sometimes shift the strategy of academics to align them with our needs.

Participant 10: We ensure that the competency-based interviews are taking place and the employee we are able to see that he has the cultural fit to our company that we ensure in the beginning.

All the participants referred to a number of strategies and tools that their organizations utilize to recruit and hire talent. Participants 1, 4, and 9 noted that the organization participates in several career fairs locally and internationally in order to find talent. Participants 1 and 6 added that the organization has its own academic institutions and educational programs that provide it with the workforce needed. Participant 2
indicated that due to the limited supply of engineers, the organization tends to hire people from different disciplines from both the local and international markets. He also stated that “The company’s strategy is to hire and then develop and train.” Participants 3 and 8 identified a number of recruiting and hiring strategies used by the organization: outsourcing, inside hires, employee referrals, newspapers, internet sources, hires of family member of employees who have long service with the organization, walk-ins, and the company’s career website. Participant 7 added that the organization also re-hires former employees and converts some of its contractors into direct hires. Participant 5 referred to another recruiting and hiring strategy, whereby the organization does not hire people with a higher salary than their existing employees before making necessary adjustments to their current employees’ compensation packages in order not to demotivate or even lose the latter. Participants 4 and 9 noted that the organization collaborates with universities by supporting some of their programs and by recruiting and hiring their graduates.

According to Participants 3 and 10, the organization uses competency-based interviews to ensure that any hires will be a good cultural fit for the organization. Participant 7 stated that the organization uses psychometric testing and workplace sample tests when hiring. On the other hand, Participant 6 suggested that the organization should work with educational providers to ensure that people with the right talent and skills are available at the right time to meet the organization’s five-year projections. He expressed the view that it is challenging to accurately project workforce requirements and enhance the talent acquisition process in the organization because the organization has several units or areas that deal with developing and recruiting talent: “what one projects today
[and] what one gets tomorrow how the two match is probably not perfect and there is more work needs to be done in order to make that alignment more effective.”

The collected secondary and archival data confirmed that ADNOC and its Group of Companies allocate a generous budget to participating in career fairs and exhibitions in order to recruit employees from various disciplines. Applications for jobs are accepted in person or via the organization’s website. The organization holds weekly meetings to review job applications and interview candidates. Prior to an interview, the candidate takes a written assessment test. Furthermore, the organization also collaborates with local and abroad institutes to provide them with talent. No evidence was found for solid selection criteria other than the minimum qualifications for positions and their related job grades, which recorded in the HR manual.

**Theme 8: Investing in Education, Training, and Professional Development**

ADNOC has several initiatives in place to develop the scarce human capital and develop talent pipelines to support its business strategy by investing heavily in education, training, and professional development. ADNOC has established its own academic institutions, such as the Glenelg School of Abu Dhabi, the Petroleum Institute, the ADNOC Technical Institute, and other training and scholarship programs in order to provide its sector with talented employees for years to come. The organization provides employees with training and opportunities to grow and advance in their careers. On these points, some representative statements from the participants are as follows:

*Participant 1:* They [the employees] are clear [about] their future career paths. They know what they will be reaching. They’ve been given very intensive training, courses, conferences, involvement, and enlargement in their jobs, enrichment, so many things to make those people or those employees in the pool to be our future leaders for ADNOC and its Group of Companies.
Participant 1 added: We have huge investments on education[s]. We have established a school, high schools with an average of 5,600 students. We have our Petroleum Institute. They have more than 1,700 students. We have our ATI. They have around 750 students. So then ADNOC senior management they are very focused and paying attention to the investment on education.

Participant 2: I think in the last 10 years more coordination is being extended with the education institutions, this is from one side. From [the] other end, specialized education institutions [have] been established. Let’s say, for example, the Petroleum Institute ADNOC and some specific disciplines have been introduced in the curriculum and universities’ education[s] in order to ensure that graduates have the right knowledge and [are] equipped with the right skills … precisely required for the oil industry’s different fields.

Participant 2 added: We also ensure that from the value-based gap analysis, the employees are getting into a kind of the VPs and the higher-level people, they are getting into the IMD-level certification program [management certificate programs], bring[ing] them all in the same line of the leadership quality. And, all the managers and the team leaders, they have been sent for a 15-day certified manager course for three modules.

Participant 3: One of our missions is training and development of our employees because overall, without development, we cannot move, we cannot challenge.

Participant 4: [We] have a program called a competency program. They are developing the employee to target his position within two years depending on the student’s or the employee’s performance.

Participant 4 added: The main reason of establishing this institute [ATI] is to develop or to have technical people…. This is one program that we have in the institute 1,200 students plus the petroleum institute. [In] the petroleum institute, we have males and females who are studying purely engineering, mechanical and chemical … related to the oil and gas industries. We have about 1,500 students plus the ADNOC’s Scholarship Program…. We have different programs. We are investing, you can just imagine, number of millions of dollars only in education and developing the education itself.

Participant 5: We have two parts, one is what we call the managerial track and for that we have created a leadership development framework and introduced a new function within the company outside the training, leadership development where people going through the managerial track or the leadership track get coaching—they get proper training programs from [a] reputable organization. But also, we financially support those who want to seek higher education outside working hours. They work during the day and they pursue an online program or a master degree after working hours during the weekend.
Participant 6: We have the CAMPS program, which basically operates and helps to integrate … technical staff …we have [the] Petroleum institute, and the ATI, the ADNOC Technical Institute, and we basically provide professionally skilled engineering staff and technical staff for operations and our operating companies.

Participant 7: Four ways [training programs]: one is through our training center, or through performance management where we analyzed the gaps between the employee’s skills and what the job requires and where we also use in-house and public training programs. The third one is that we have got our own computer-based training programs, so employees actually in their spare time, they can learn and there’s a system [of] basic training. And, the fourth one, actually, is on-the-job training.

Participant 8: We give [employees] training. Some of them, for the nationals, we have special programs to raise them to the level of the job they will do. And, sometimes, they are long programs: 2 years, 3 years, 4 years, depends on the program. This is all investment in [the] development of people. We have a training center, actually two training centers.

Participant 9: We have a competency-based development program. We call it CAMPs and this is for the graduates, to make sure that they are aligned and to see the integration is very smoothly targeted to [their] positions.

Participant 10: Once the employee is in, there is a continuous training and development program, integration program, competency-based promotion, and career progression.

The 10 participants (100%) indicated that the organization provides them with multiple opportunities to grow professionally. Participants 1, 3, and 6 supported this perspective by indicating that the employees in their organizations receive intensive training and attend courses and conferences. Moreover, Participants 1, 2, and 6 noted that the organization invests heavily in education. Participant 5 indicated that the employees at the organization receive financial support in order to pursue higher education.

Participant 6 noted that “This organization probably makes more investment than many organizations in education, training, and development. It makes [an] enormous investment in people actually.” Participants 1, 4, and 6 noted that the organization has established academic institutes and programs for the principal purpose of developing a
technical workforce for ADNOC and its Group of Companies (e.g., the ADNOC Technical Institute, the Petroleum Institute, and the ADNOC Scholarship Program). In addition, Participant 7 identified four training approaches that ADNOC and its Group of Companies offer to their employees: the organization’s Training Center, in-house and external training, computer-based training programs, and on-the-job training. Six participants (2, 4, 5, 8, 9, and 10) indicated that the organization offers various programs and opportunities for career advancement.

The documents and archival data confirm that ADNOC and its Group of Companies invest heavily in education, training and professional development. The records showed a list of employees who benefited from training and educational support. ADNOC and its Group of Companies allocate a large budget for education and training. They have established their own academic institutes and scholarship programs through which students receive monthly monetary incentives and are offered a position, upon graduation. More information about these different educational and training programs is well documented and made available for all employees in both printed and electronic materials.

**Theme 9: Offering Attractive Compensation and Benefits**

Offering attractive compensation and benefits helps organizations to attract, motivate, and retain the talent they need to pursue their shared vision. According to Gupta and Shaw (2013), the compensation and benefits package is a critical factor that influences the effectiveness of both the business and employees. An analysis of the study indicates that nine participants (90%) agreed that the organization offers attractive and competitive compensation and benefits, including competitive salaries, programs to support employees’ welfare, an educational allowance, a reward system, an
accommodation allowance, time off, flextime, and promotions. On these points, some representative statements from the participants are as follows:

Participant 1: Last year, xxx management, they reviewed the … [compensation] package overall. And, they changed it to be very attractive to all job seekers. Especially, since we are having a high percentage of requirements for engineers. We give them a special package. Special grade, they are being promoted in very good progress.

Participant 1 added: We provided all employees with something we call it [the] “Education Allowance.” So that their children, they will make sure that their children will have a very good level of education allowance.

Participant 2: I think in the last 10 years, the company has succeeded to develop and introduce a variety of programs to ensure that this type of programs and variety of programs really catered for different categories … that also touch the other aspect of personal life, including the employees’ families, their welfare, their health, their recreation, and which is expressed in a way or another by the company’s accountability and responsibility towards the society.

Participant 3: In term[s] of flexib[ility] and facilities, we only work 8 hours from 7 a.m. to 3 p.m. We have 1 hour flexible. We can come at 8, and we leave at 4:00 p.m. 7.30 a.m. and we leave at 3.30 p.m.

Participant 3 added: The education support and allowance is unlimited. How many children, does not matter. It is supported by the company with the limit of AED 40,000, depends on the job grade AED 45,000, 40,000. Of course, they give accommodation. They even give other benefits. So this is all facilities, flexibility, [that] attract the people, to attract the talent[ed] people even from the outside to join this company.

Participant 4: Even the company has taken care of my kids. They are providing [me] with educational assistance. My kids, they are studying in a private school free of charge. They are paying the cost of their tuitions, their books, for example. And, even the healthcare, they are giving us a good coverage….even if I have any situations death or anything, the company give[s] us sick leave or any leave I needed. It is already secured in our policy.

Participant 5: We’ve also introduced a salary management system … although two individuals can go into the same job title, they both can have different salary because we recognize their experience, previous experience, how good that is, their qualification, and how good they did in the interview.

Participant 5 added: We have, in every business unit and at the corporate level, something called the employee welfare, and employee sports creation committee that is funded by the company. These committees organize and support internal clubs…. We do family activities, we do things for children, we
do things for the spouses of the employees, male or female, and we try to engage them in company business by allowing them to attend corporate event[s] and seminars and things like that.

*Participant 6:* I think our compensation system really needs to be molded to performance. And, we almost need to take the perspective that performance-related pay, which most organizations have or many organizations have, it’s not a cost, it’s a driver for performance and improvement so whatever if we link performance directly to bonus and increases the people receive. When you receive the bonus as the percentage of the performance improvement achieved, and we make that clear [at the] front end, rather than giving people a bonus that doesn’t appear to be directly related to how business is performing.

*Participant 7:* The compensation philosophy or policy that we have is based on attracting, motivating, and retaining and rewarding people, and it is addressing the needs because it is based on the market level....We have got our salary offerings and the way we attract people also is competitive compared with the region, all the regions that we work in.

*Participant 8:* We don’t pay the best in the market, but they tend to come to us. It’s [a] well-structured organization, especially in xxx. It’s stable, its security issues, and security—job security. It’s you get a job, maybe get [a] lifetime job.

*Participant 9:* Salary is very important for them [employees], especially when it comes in some specialty. So what we did, we added a new benefit, what we call it, market adjustment. It is very important for the talented people that you need to bring. We are incorporated with one of the international standard[s], where we do a study for each individual position, we call it critical positions, scarcity position.

*Participant 9 added:* We have benefits for employee[s] where they can go and get [health club] memberships anywhere they want. You see the oil and gas discounts everywhere, hotels, everywhere. So this privilege, it gives specialty treatment for the employees, and they see themselves as different like they’re proud, and they go anywhere … [and] say I’m [an] xxx employee.

*Participant 10:* Work–life balance, if you look at our xxx employee engagement score, the work–life balance is one of the strengths in xxx, which means that people are able to see the balance between their personal life and their social life [and] the professional life.

Most of the participants articulated the view that the organization has a competitive compensation and benefits package. Participants 1 and 9 indicated that the organization benchmarks within the market in order to remain competitive and attract and retain employees. Participant 7 supported this sentiment by saying that “The
compensation philosophy or policy that we have is based on attracting, motivating, and retaining and rewarding people, and it is addressing the needs because it is based on the market level.” Additionally, Participants 1, 3, and 4 expressed a high level of satisfaction with the educational allowance they receive from the organization to cover their children’s school tuition.

Many of the participants (2, 3, 4, 5, and 9) identified other attractive compensation and benefits such as employee welfare, organized activities for family members, flexibility in terms of hours and life situations, available facilities, and the variety of discounts for health club/gym memberships and hotels. Participant 5 commented that “we [the organization] believe that unless the employee is happy outside the office, he will … not produce to the level require[d].” However, Participant 8 noted that although the organization might not pay the very highest salaries, it does offer considerable job security. On the other hand, Participant 6 believes that the compensation system should be linked directly to performance and achievement. He stated that “We are not encouraging performance, we are just rewarding people regardless of what they have done.” However, in general, most of the participants indicated that they are very satisfied with the compensation and benefits offered. Participant 4 articulated this perspective thus: “Even my son from now he said: Dad I want to be an engineer to join your company. They are treating you very well. And, I’m always seeing you back home happy. I want to be [the] same as you, happy.”

The collected documents and archival records support the participants’ perceptions about the attractive compensation and benefits packages. Records showed that ADNOC and its Group of Companies have made several revisions to their compensation and benefits package to compete with the local market and attract talent.
Details of these compensation and benefits were found in the employee handbook, HR manual, and internal correspondence. In addition to the attractive salaries and monetary incentives, the organization offers a variety of benefits such as the educational child allowance, flexible working hours, health club memberships, and multiple opportunities to grow professionally.

Chapter Summary

This chapter presented the findings of this study. An overview of the procedures used to conduct the single case study and the three research questions central to the study. The researcher collected data directly from purposefully selected line managers in ADNOC and its Group of Companies via face-to-face interviews. During the interviews, the participants provided the researcher with relevant documents and archival records to advance the research topic and support their statements. Based on the data, the researcher developed themes that were analyzed in this chapter. A total of nine themes emerged from the research questions: (1) defining and communicating a shared vision; (2) nationalizing a human capital (Emiratization); (3) integrating and aligning policies and practices; (4) identifying current and future workforce needs; (5) promoting engagement and collaboration; (6) evaluating and benchmarking; (7) recruiting and hiring strategies; (8) investing in education, training, and professional development; and (9) offering attractive compensation and benefits. Themes, descriptions, and a sample of the participants’ responses were presented to stay as close as possible to the participants’ perceptions. The reliability and validity of the data was achieved through member checks, peer reviews, and an audit trail. Further, the researcher worked to achieve triangulation to the greatest possible degree by comparing each participant’s interview data to that of the other participants and to the documents and archival data reviewed.
Chapter 5
Summary, Discussion, and Recommendations

This final chapter provides a summary of the study, including the purpose, research methodology, and conceptual framework used to guide it. The chapter presents conclusions, discusses the study’s limitations, and discusses potential implications. Recommendations for practitioners and for future research in the field of SWP and organizational alignment are also offered.

Study Summary

Overview. Human capital represents a major financial and social investment (Leek, 1983). It is the most valuable resource and strategic asset for the growth and sustainability of any organization and country. Rothwell et al. (2012) argued that the organizational imperatives for succeeding in today's economy relate to an organization’s preparedness to handle the “unpredictability” of the business environment, its ability to manage the “unpredictability” of talent needs, and its intensive focus on managing costs and utilizing resources. Adequately matching workforce demand and its supply is a key process in the labor market. Therefore, training and development professionals, organizational leaders, and decision-makers need to be able to analyze current workforce capacity and to understand the value of strategic workforce planning (SWP) in order to address future workforce needs and achieve strategic goals. Further, SWP should be designed and implemented in a way that supports an organization’s strategic goals and objectives.

According to Gill (1996), SWP has been an important management tool for balancing and structuring the skills of the workforce since the 1960s. El-Quliti and Al-Darrab (2009) stated that SWP is a critical process that helps organizations develop a
plan of action to ensure that the right number of people with the right skills will be available at the right time and in the right jobs. Most importantly, SWP assists organizations in pursuing their long-term mission and vision. Additionally, SWP can provide valuable information to assist training and development professionals, and decision-makers in addressing priorities and implementing policies and practices to achieve desired outcomes.

**Purpose.** There is an urgent need for effective HCM and SWP in the UAE, particularly in the oil and gas industry—the backbone of the country’s economy. For reasons previously described, the greatest challenge facing organizations in the UAE is attracting and retaining a skilled workforce, particularly UAE nationals, to counter the impact of an ageing workforce, demographic changes, current and projected production demands, and the economic environment. Therefore, the primary purpose of this study was to explore, describe, and interpret how the phenomena of SWP and organizational alignment are perceived as an aspect of HCM in the Abu Dhabi National Oil Company (ADNOC) and its Group of Companies. Findings from this study provide an understanding of the human capital system within ADNOC and its Group of Companies, and identify key business factors that may enhance the organization’s SWP process in addition to assessing and developing their HCM.

**Methodology.** A qualitative single-case study research design was most appropriate for providing insight into the investigated phenomena, and for answering the following research questions:

1. What are the perceptions of the line managers at ADNOC and its Groups of Companies of their strategic workforce planning in achieving their strategic goals?
2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?

3. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?

Purposeful sampling was used to select ten participants from ADNOC and its Group of Companies. The selection criteria for the participants were:

1. A minimum of five years’ experience with the same company within ADNOC and its Group of Companies.
2. A minimum of five years’ experience in a managerial position at this company.

Semi-structured face-to-face interviews were conducted, and documents and archival records were reviewed in order to support the triangulation process. Participants were asked a total of nine interview questions (refer to Table 3.2 and Appendix B for details) for the purpose of gathering pertinent information about SWP practices and organizational alignment at their organizations. All interviews were digitally recorded and then transcribed verbatim. Subsequently, the transcriptions were analyzed and coded for emergent themes.

Conceptual framework. This study was guided by the Human Capital Self-Assessment Framework developed by the U.S. Government Accountability Office (GAO)—a diagnostic tool intended to capture organizational leaders’ perceptions of their individual organization’s human capital policies and practices in order to evaluate and improve their human capital systems. The framework is based on the following key areas: (1) \textit{strategic planning}, (2) \textit{organizational alignment}, (3) \textit{leadership}, (4) \textit{talent}, and (5) \textit{performance culture}. All five areas are important for the effective management of human
capital; however, strategic planning, organizational alignment, and talent were selected for this study due to their association with SWP and the extensive time required by the interviewees to address all five areas.

**Conclusions and Discussion**

This section discusses the findings of the study and the themes that emerged from the interview data for each of the research questions (RQs 1–3). The analysis and interpretation of the data collected in this study, which involved a detailed six-step coding and themes analysis process, identified nine overarching themes. The identified themes were based on questions pertaining to the three selected key areas. The study’s findings have a number of practical implications and recommendations for researchers, training and development professionals, organizational leaders, and policy- and decision-makers who wish to utilize effective SWP. According to Osman, Ho, and Galang (2011), effective implementation of human capital policies and practices such as recruitment, training, and rewards and promotion are strongly related to organizational performance, such that human capital is one of the key sources of competitive advantage.

**Strategic Planning**

**RQ 1. What are the perceptions of the line managers at ADNOC and its Group of Companies of their strategic workforce planning in achieving their strategic goals?**

According to the GAO (2000), a high-performance organization should have a clearly defined and well-communicated shared vision in order to successfully accomplish its strategic goals. A shared vision is composed of a mission, a vision for the future, core values, goals and objectives, and strategies. These components should be clearly, constantly, and consistently communicated to all business units in the organization. An organization’s shared vision provides the framework for assessing the relevance and
effectiveness of everything the organization undertakes. In terms of human capital development, the organization should build strategies to improve the value of its employees and focus its efforts on achieving the shared vision. Specifically, all human capital policies and practices in the organization should be integrated into its business practices and geared toward supporting and achieving the organization’s shared vision. Therefore, the purpose of RQ 1 was to explore and understand how participants perceived the integral connection between SWP and the strategic goals at their respective organizations. Three themes were generated to answer RQ1: defining and communicating a shared vision, nationalizing human capital or Emiratization, and evaluating and benchmarking.

**Shared vision.** The majority of study participants recognized the importance of defining and communicating their organization’s shared vision clearly and constantly. They confirmed that the shared vision of their respective organizations is clearly defined and well-communicated with all business units through various means, especially during regular meetings. Most of the organizations listed their visions and missions on their websites. Moreover, the vision and mission of the organization were available in employee handbooks.

Each organization has a five-year strategic plan, developed by ADNOC headquarters and communicated to all subsidiaries, that focuses on the human capital factor. This five-year plan is reviewed annually and if necessary it is modified. Organizational documents also showed memorandums requesting divisions to participate in reviewing the organization’s five-year plan. The findings indicated that ADNOC and its Group of Companies have developed a strategic workforce plan that is clearly
communicated and shared with all business units and stakeholders to uphold their mission and achieve strategic goals collectively.

Although all the participants recognized the importance of the organization’s vision and confirmed that the organization has communicated that clearly, most were unable to articulate the organization’s shared vision clearly. The shared vision and the organization’s strategic plan also were found in the organizational documents and websites available to all employees.

**Emiratization.** All the participants acknowledged the importance of the “Emiratization” initiative to their individual organizations and to ADNOC as a whole. They confirmed that their organizations have taken all the necessary steps to translate and integrate this initiative into strategies and practices, including forming a committee and establishing an independent department with the sole responsibility of supporting and implementing the nationalization of human capital strategy. Also, all the participants were aware of the percentage of UAE nationals they need to employ at their organizations by a certain year. Documents and archival records included magazines, company reports, and charts presenting each organization’s progress toward increasing the number of UAE nationals. The findings showed that the Emiratization initiative is a critical component driving ADNOC and its Group of Companies’ strategic workforce plan. It is evident that this strategy is clearly defined and effectively communicated to (and enforced by) all business units. ADNOC and its Group of Companies are dedicated to achieving the “Emiratization” target by investing heavily in recruitment, training, and education. Various programs and academic institutes were established with the principal purpose of attracting UAE nationals.
Evaluating and benchmarking. Most of the participants reported that ADNOC and its Group of Companies regularly review all policies and practices pertaining to human capital, and that they benchmark these against other high-performance organizations in their local markets. The collected documents and archival records confirmed their statements and showed that their companies have prepared and adopted several proposals to improve their human capital policies, programs, and practices. This is performed in order to determine whether any adjustments are needed to win the competition for talent and support the organization’s overall SWP. Moreover, the organizations were perceived as employing effective performance management tools to evaluate personnel and the organization as a whole. The companies conducted various assessment programs and allocated resources and budgets to support various functions within their organizations. They have several performance management tools to evaluate the organization’s and employees’ performance such as key performance indicators, an employee performance evaluation form, and a competency assessment program. However, these tools are not used in all the directorates and divisions. Overall, all the participants’ perceptions and the documents obtained indicated that ADNOC and its Group of Companies have a systematic performance evaluation that help them to attract talent and sustain competitive advantage and attract talent.

Organizational Alignment

RQ 2. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?

A high-performance organization incorporates all its organizational components, activities, core processes, and resources in support of its mission and vision. Such an organization aligns its HCM systems with its strategic and program-planning efforts.
Additionally, a high-performance organization has explicit workforce-planning strategies that help it identify current and future workforce needs. Its leaders also encourage its human capital professionals to collaborate with different business units in developing, implementing, and assessing the organization’s approach to human capital (GAO, 2000). Therefore, the purpose of RQ 2 was to learn how participants perceive the link between the various organizational components and HCM systems in their respective organizations. Three themes were identified from the collected data to answer RQ 2: integrating and aligning policies and practices, identifying current and future workforce needs, and promoting engagement and collaboration.

Policies and practices. The study findings indicate that the majority of the study’s participants viewed the human capital policies and practices in their organizations as coherent and effective in terms of actualizing the organization’s shared vision. They indicated that their organizations’ existing policies and practices were geared toward developing and retaining employees. They believed that their organization has flexible and supportive human capital policies and practices. The findings also reflected that policies and practices in these organizations are regularly reviewed and evaluated in order to attain (and maintain) a competitive advantage as well as support strategic plans. A number of internal circulars and some correspondence show that several new policies and modifications have been proposed and implemented over the past few years. A number of policies and programs are offered to improve employees’ performance, attract talent, and retain employees. These findings emphasize that policies and practices are aligned with the organizations’ strategic program planning.

Identifying gaps. The study participants reported that their organizations use many different tools and strategies to identify gaps in regard to current and future workforce
needs. These tools included SWOT analysis, balanced scorecard, Key Performance Indicators, and competency assessment programs. Moreover, the organizations use an online system to share data among directorates and divisions to accurately estimate and determine workforce needs. Most of the participants also indicated that each business unit identifies and projects its workforce needs. However, the participants did not provide descriptions of any explicit step-by-step procedures used to determine workforce needs. The participants also stated that HR plays a major role in coordinating and supplying the workforce needed by the units. The organizational documents collected confirmed that HR communicates with each directorate to secure the workforce needs of each for the upcoming year. The findings signified that each business unit determines its own workforce needs while HR acts as a partner to ensure that these needs are met and that the business units in this regard are complementing the organization’s overall strategic plan.

**Engagement and collaboration.** All the participants indicated that their organizations promote engagement and facilitate collaboration in order to gain employees’ and business units’ collective support and commitment to pursuing the organizations’ shared vision. The organizations offer platforms to encourage employees, across all levels of management and business units, to share ideas and make suggestions. The directorates and divisions work collaboratively on many projects and hold regular meetings. Several committees were also formed to collaborate, make recommendations, and to follow and manage a range of assignments and projects. Moreover, the organizations collaborate with other government and private entities, including academic institutes, to recruit and develop employees to satisfy business requirements and support the ultimate goal of advancing the mission and creating profit. The findings demonstrate that engagement and collaboration contribute positively to SWP in ADNOC and its
Group of Companies, and that activities to foster these efforts are aligned with the organization’s strategic goals.

**Talent**

**RQ 3. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?**

According to GAO (2000), a successful organization acquires, develops, and retains competent employees to fulfill its strategic goals and invests in its workforce through education, training, and opportunities for continued growth. In addition, such an organization matches the right people to the right jobs and stays alert to the changing characteristics of the labor environment. RQ 3 was formulated to gain insight into the participants’ perceptions of how their organizations manage talent to meet strategic targets. The following three themes emerged from the interviews: recruiting and hiring strategies; investing in education, training, and professional development; and offering attractive compensation and benefits.

**Recruiting and hiring.** According to the participants, ADNOC and its Group of Companies have a number of strategies for fulfilling short- and long-term workforce needs, and specifically, for addressing any gaps identified through SWP. Some of these strategies are participating in career fairs, making campus visits, re-hiring former employees, taking employee referrals, outsourcing, making inside hires, and taking walk-ins. One very important strategy that differentiates ADNOC and its Group of Companies from other organizations is that ADNOC has established its own academic institutions in order to develop its own workforce. ADNOC and its Group of Companies also offer a number of scholarship programs that focus on students at a range of educational levels to encourage them to study disciplines related to the oil and gas industry and to work with
their companies upon graduation. Additionally, the organizations conduct competency-based interviews and use several metrics for recruitment and selection to ensure that the candidate is culturally fit for the organization. The findings indicate that the recruiting and hiring strategies at these organizations are heavily geared toward Emiratization. In fact, the participants identified numerous strategies for recruiting and retaining national talent. And, overall, the organizations were found to be more lenient toward and intensively invested in hiring UAE nationals.

**Education, training, and professional development.** According to Michaels et al. (2001), “Winning the war for talent requires more than just winning the recruiting battle. Companies also have to make development a pervasive part of their company” (p. 14). The study findings reveal that ADNOC and its Group of Companies have undertaken several initiatives to develop their human capital and to build talent pipelines to support their business strategy by investing substantially in education, training, and professional development. They have established their own academic institutions, scholarship programs, and other educational and training programs. All the participants acknowledged the value of education, training, and professional development, noting that their organizations provide them with generous training and opportunities to advance professionally. They reported that professional development opportunities are key in attracting talent to and retaining employees at ADNOC and its Group of Companies. The companies’ strategy is to hire first then develop and train. Participants also reported that their organizations partner with academic institutions to develop and enhance curriculums that meet their business needs. The study findings reflect that ADNOC and its Group of Companies pay great attention to their human capital development and invest extensively in education and training at an early stage.
Compensation and benefits. High turnover and demotivated employees are hindering many organizations’ ability to grow and succeed. However, offering attractive compensation and benefits helps organizations attract, motivate, and retain professionals, and enables them to pursue strategic goals. Messmer (2006) stated that “offering a fair and competitive salary is the most obvious way to attract and keep top talent, even though money isn’t always the key factor in determining an employee’s job satisfaction” (p. 13).

According to Gupta and Shaw (2013), compensation and benefits are key factors that influence the effectiveness of both the business and its employees. All the study participants perceived the compensation and benefits provided by their organizations as attractive and, therefore, as an effective way to recruit, motivate, and retain employees. These included monetary and nonmonetary incentives such as high salaries, yearly bonuses, educational allowances, professional development, flextime, health insurance, and job security. Moreover, the study found that the organizations regularly review and benchmark their compensation and benefits packages in order to attain talent and gain a competitive advantage in the labor market.

Implications of the Study

In the contemporary global knowledge-based economy, human capital constitutes perhaps the most significant asset for most organizations. Despite its importance, human capital is often not optimized or even well managed. Most organizations are not attuned to either current or projected workforce gaps, both of which undermine efforts to implement strategic plans designed to support an organization’s mission, vision, and goals (Anca-Ioana, 2013; Barrick, Thurgood, Smith & Courtright, 2015; GAO, 2002).

Focused on SWP and organizational alignment, the present study offered evidence suggesting that appropriate investment in human capital can aid an organization in
sustaining a competitive advantage and achieving its strategic goals. Based on the study findings, ADNOC and its Group of Companies are successful in attracting talent and have gradually reduced the workforce gap despite the population imbalance caused by a high proportion of foreign workers and other challenges in the local market. This success is due to ADNOC’s attractive human capital policies, programs, strategies, and practices.

Aligning SWP with an organization’s strategic goals continues to present challenges for most organizational leaders and decision-makers. Therefore, senior management support, incentives to engage managers, the development of SWP proficiency, and revisions to people policies are vital to successful deployment and implementation of SWP. Monitoring and evaluating the progress of any SWP initiative and its contribution to the organizational strategic goals should be performed on a regular basis (GAO, 2012). Further, all organizational components, policies, and practices should be developed, implemented, and assessed in order to help organizations to support or improve their overall operational and strategic objectives such that desired outcomes can be achieved. Thus, SWP is crucial tool that can have a positive significant impact on organizational success if developed and implemented effectively:

Successful implementation of a strategic staffing process lies not in how these basic steps are defined. The “devil is in the details”—or perhaps more appropriately in this case—the devil is in the implementation. It is not the steps themselves that are important, it is how they are developed and implemented that counts. (Bechet, 2002, p. 466)

The study revealed several considerations pertinent to HCM and to SWP in particular. The study’s contributions to the field include a definition of practical and functional
SWP practices in addition to an inventory of the tools that organizations can use to successfully evaluate workforce needs and then act in accordance with them. The researcher concluded that ADNOC and its Group of Companies have a clearly defined and well-communicated shared vision. Their strategic workforce plan is clearly communicated to all organizational levels and integrated well into all their human capital policies, programs, and practices. They share their vision and mission with all their employees at different levels and through various means in order to achieve the organization’s strategic goals collectively. Further, they utilize various techniques and tools to assess both the performance of the organization and of the employees. The organization offers what the employees consider to be an attractive compensation and benefits system that is instrumental in efforts to acquire and retain talent. The organization has also created an engaging environment and established partnerships with several entities and institutes in order to gain collective support and commitment from all their business units and employees in pursuing the vision shared by ADNOC and its Group of Companies.

Moreover, the organization has taken multiple steps and instituted a number of procedures to ensure that its workforce has the ability and capacity to achieve organizational goals. Further, ADNOC and its Group of Companies have established their own schools, institutes, and other programs as a source of employees with the specific skills needed by the organization. The organization also identifies other sources of talent to make up for shortfalls in the local labor market. In addition, the findings also demonstrate that the organization is focused on nationalizing its workforce (Emiratization). All the participants noted that their organizations pay considerable attention to pursuing the Emiratization strategy, which is considered a top priority and a
fundamental element of the organization’s strategic workforce plan. Finally, the organization is engaged in continually evaluating and benchmarking its human resources management practices. However, none of the participants asserted that their organizations have a solid SWP aligned to strategic goals.

Based on the study findings, ADNOC and its Group of Companies could benefit from using the GAO’s Self-Assessment Checklist model to begin a more systematic, in-depth, and continuous effort to evaluate and improve their HCM system and create effective strategic workforce plans to achieve strategic goals. Overall, a key finding is that the organization would benefit from assessing all its policies and practices in order to ensure that its SWP is aligned with its organizational strategic goals so that it can fulfill its mission, goals, and objectives, and thereby gain a competitive advantage. The study concluded that ADNOC and its Group of Companies have developed their SWP following the two principles from the GAO (2000) model: investing in the workforce, and aligning people policies to accomplish the organization’s shared vision.

**Recommendations for Practitioners**

The scope of this single case study was limited to the existing HCM policies and practices of ADNOC and its Group of Companies. This organization was selected because, as the largest national oil company in the UAE, it is recognized as one of the world’s leading companies in the oil and gas industry. Although not necessarily a fit for other industries, the HCM policies and practices presented in this study may provide a foundation for organizations of a similar size and/or with other similar characteristics to gain insights into their own internal obstacles or opportunities in relation to the management of HCM. This study provided valuable insight into the human capital policies and practices employed by ADNOC and its Group of Companies and into factors
that impact the deployment of SWP. Hence, organizations and practitioners could use ADNOC and its Group of Companies as a benchmark for excellence and best practices in HCM.

In addition, the findings of this study emphasized that achieving organizational goals requires collective support and commitment from all business units and employees in the organization. Thus, creating a positive and healthy work environment in which employees are engaged and empowered to participate in developing and implementing future workforce strategies can play a significant role in the success of SWP initiatives. Moreover, findings from this study can be used as a basis for furthering understanding of human capital system development in organizations and as a basis for any given organization to identify the key business factors that would make its SWP more effective. These findings could also aid training and development professionals, decision-makers, and other practitioners in determining other important factors that impact SWP effectiveness.

Further, without a specific strategic workforce plan and a related action plan through which the strategies are effectively implemented, it will be difficult for an organization to address workforce gaps. Organizational leaders and decision-makers should ensure that strategic workforce plans are aligned with their organizations' structures and governance processes. It is also necessary to perform regular assessment and evaluation in order to revise plans if necessary. Last, organizations should adopt strategies in their SWP that best incorporate the context of their local environment in order to acquire and retain the competent employees needed to achieve organizational goals and support business sustainability.
Recommendations for Future Research

This study provides a number of recommendations for future research. For example, future research may benefit from an examination of the GAO model in other organizations of a similar size and/or with other similar characteristics in order to identify SWP processes and practices. Researchers could also study how these organizations in the UAE practice HCM and develop strategic workforce plans and compare the practices with those of multinational companies. Further research of this nature could highlight how these additional processes and practices can be successfully applied and aligned with organizational goals.

Given that it is qualitative in nature, the present study does not present quantitative evidence to show that the participants’ perceptions of SWP and organizational alignment are shared across ADNOC and its Group of Companies as a whole. Hence, a quantitative or mixed-methods research study could provide additional insights and confirm or reject the thematic interpretations developed herein. Moreover, conducting a comparative study in a multiple case study research design would allow for an examination of SWP practices and processes in a variety of settings.

Furthermore, in future studies, researchers could create an instrument based on the identified themes found in this study to aid the organization and other organizations with similar characteristics in evaluating the role of these themes to achieving success in terms of SWP. The instrument may also help in identifying areas that require improvement in order to develop an effective strategic workforce plan aligned with the organization’s strategic goals.

For the present study, the researcher collected data from ten employees who were in line management positions only; therefore, the perceptions of a broader range of
employees were not captured. However, the inclusion of a broader range of employees in various positions throughout the organization is likely to reveal more beneficial data and perhaps may even lead to a different conclusion. Moreover, researchers could use a larger sample size to ensure that most perceptions likely to be important are covered and thereby strengthen the research findings.

In addition, ADNOC and its Group of Companies constitute an exceptional case. This organization invests significantly in its employees through education, training, and professional development. The organization has established its own schools, institutes, and scholarship programs in order to develop human capital and create talent pipelines to support business strategies. However, the scope of this study did not allow for an exploration of the effectiveness and efficiency of these HCM practices. Hence, it would be beneficial for future research to focus on measuring the return on investment in education and training in ADNOC and its Group of Companies.

Last, the focus of this study was limited to three of the five key areas in the GAO Human Capital Self-Assessment model: strategic planning, organizational alignment, and talent management. Future research could consider all five areas, i.e., including leadership and performance culture to gain a comprehensive understanding of HCM practices in the organization.

**Chapter Summary**

This chapter presented an overview of the case study. The primary purpose of the study, methodology, and the conceptual framework guiding this study were summarized. The findings from Chapter 4 were discussed in relation to the study’s three research questions and identified nine main themes. The implications of the study were described and recommendations for practitioners and future research provided.
References


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doi:10.1016/j.hrmr.2013.08.007

doi:10.1177/1525822X05279903


APPENDIX A
Case Study Protocol

The following case study protocol was adapted from Yin (2009):

I. Purpose of the case study:
   The study intends to explore, describe, and interpret how the phenomena of strategic workforce planning (SWP) and organizational alignment were perceived as aspects of human capital management in the Abu Dhabi National Oil Company (ADNOC) and its Group of Companies in the UAE.

II. Field procedures
   a. Submit IRB and secure IRB approval.
   b. Contact the companies to secure site permission.
   c. Identify potential interview participants.
   d. Contact potential participants via email or phone calls.
   e. Self-introduction/presentation of credentials, explain the study, discuss research questions and criteria for participant selection, and advise as to why the participant has been selected to participate in the study.
   f. Explain the human subjects requirement and obtain necessary consent, in writing.
   g. Schedule interview then conduct the interviews using appropriate interview guide.
   h. Answer any questions that may arise from participant during interview.
   i. Transcribe interviews.
   j. Collect supporting documents and archival records.
   k. Thank the participant for his/her participation in the research.
   l. Ask for permission for future follow-up if necessary.
   m. Send case study report to each participant to be checked for accuracy.

III. Case study questions
   a. The goal of this study is to answer the following research questions:
      i. What are the perceptions of the line managers at ADNOC and its Groups of Companies of their strategic workforce planning in achieving their strategic goals?
      ii. How do the line managers at ADNOC and its Group of Companies describe their organizational alignment?
      iii. How do the line managers at ADNOC and its Group of Companies understand and describe talent management in their organization?
   b. For full interview guide, see Appendix D.

IV. Case study report
   a. Case analysis
To: Participant’s Name  
From: Rashed A. Alzahmi  
Sub: Request for participation in a research study

I am a final-year Ph.D. student at the Pennsylvania State University in the United States. As a requirement for the fulfillment of my degree in Workforce Education and Development with an emphasis in Human Resource Development, I am currently conducting a research study titled *Managers’ Perceptions of Strategic Workforce Planning and Organizational Alignment: A single case study analysis*. The findings of the study could provide the rationale for improving the process of workforce planning and its place in the strategic planning system of ADNOC and its Group of Companies.

I would like to personally invite you to take part in this study. You were selected to participate based on your expertise in the human resources field at [name of participant’s company]. The requirements for volunteering are:

1. A minimum of five years’ experience with the same company within ADNOC and its Group of Companies.
2. A minimum of five years’ experience in a managerial position at this company.

Should you choose to participate, you will be asked to answer a series of questions on the subject of strategic workforce planning. The researcher will make use of a digital recorder and take narrated notes during the hour-long interview session. Please note that the information obtained during the interview is confidential and will only be used for academic research purposes.

If you have any questions, please feel free to contact me via email: raa5@psu.edu or call (050) 779-9697 in the UAE or +1 (814) 777-0008 in the US.

Thank you for your time and consideration.

Regards,

Rashed A. Alzahmi
To: Participant’s Name  
From: Rashed A. Alzahmi  
Re: Research on Managers’ perceptions of strategic workforce planning and organizational alignment

(Name)  

Thank you for your interest in my study. I am contacting you in order to schedule a convenient time for a face-to-face interview. The interview will take approximately 60 minutes. I have attached a copy of the Pennsylvania State University’s Informed Consent Form, which confirms your agreement to the terms of the study and the use of the collected information.

If you have any inquiries or concerns regarding the study or the informed consent form, please feel free to contact me via email: raa5@psu.edu or call (050) 779-9697 in the UAE or +1 (814) 777-0008 in the US.

Thank you once again for your interest in my research study. I look forward to hearing from you and moving forward with setting up the interview.

Regards,

Rashed A. Alzahmi

Attachment:  
Informed Consent Form
APPENDIX D
Interview Guide

<table>
<thead>
<tr>
<th>Elements</th>
<th>Key Questions</th>
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</thead>
<tbody>
<tr>
<td><strong>Organizational Alignment</strong></td>
<td>1. How does your organization create a coherent human capital strategy—that is, a framework of human capital policies, programs, and practices specifically designed to steer the organization toward achieving its shared vision and integrating this strategy with the organization’s overall strategic planning?</td>
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<tr>
<td></td>
<td>2. How does your organization identify its current and future workforce needs and make strategic workforce planning decisions?</td>
</tr>
<tr>
<td></td>
<td>3. What is the specific strategic workforce planning that the organization makes to identify its current and future workforce needs?</td>
</tr>
<tr>
<td><strong>Strategic Planning</strong></td>
<td>1. How does your organization make a clearly defined and well-communicated shared vision—that is, a mission, vision for the future, core values, goals and objectives, and strategies—by which the organization has defined its direction and its expectations for itself and its employees?</td>
</tr>
<tr>
<td></td>
<td>2. How does your organization create a coherent human capital strategy—that is, a framework of human capital policies, programs, and practices specifically designed to steer the organization toward achieving its shared vision and integrating this strategy with the organization’s overall strategic planning?</td>
</tr>
</tbody>
</table>

Opening Script:

Thank you for agreeing to participate in my study, “managers’ perceptions of strategic workforce planning and organizational alignment: A single case study analysis”. My name is Rashed A. Alzahmi, and I will be asking you a number of questions on the topic of strategic workforce planning and organizational alignment request that you respond honestly.

The interview should take approximately 60 minutes. Please note that our conversation will be digitally recorded and then transcribed verbatim. After the interview is concluded, you will be asked to review the transcription of the interview to confirm that the data collected is accurate and complete. Your results will be confidential, and you will not be identified individually. If you have any questions or would like to add anything to your responses, you can reach me at raa5@psu.edu or (50) 779-9697 at any time after this interview.
workforce needs—linked to its strategic and program planning efforts—including the size of the workforce, its deployment across the organization, and the competencies needed for the organization to pursue its shared vision?

4. How does the organization rely on its “personnel” or “HR” professionals (human capital professionals) to:
   a. contribute a human capital perspective to the organization’s broader strategic planning process?
   b. provide integrated mission support, participate as partners with line managers, and reach out to other organizational functions through facilitation, coordination, and counseling?
   c. lead or assist in the organization’s workforce planning efforts and in developing, implementing, and assessing human capital policies and practices that will help the organization achieve its shared vision?

5. How does the organization conduct a recruiting and hiring strategy that is targeted to fill short- and long-term human capital needs and, specifically, to fill gaps identified through its workforce planning efforts?

6. How does the organization make appropriate investments in education, training, and other developmental opportunities to help its employees build the competencies needed to achieve the organization’s shared vision?

7. Is the deployment of the organization’s workforce appropriate to mission accomplishment and keyed to efficient, effective, and economic operations?

8. How does the organization’s compensation system help it attract, motivate, retain, and reward the people it needs to pursue its shared vision?

9. How does the organization provide the flexibilities, facilities, services, and work/life programs to help it compete for talent and enhance employee satisfaction and commitment to the organization and its shared vision?

**Closing Script:**
This concludes my prepared questions. Do you have any additional comments that you would like to add or any questions for me?
Field Observations

Thank you for participating in this interview. We appreciate you taking the time to do this.
APPENDIX E
Implied Informed Consent Form for Social Science Research

IRB Protocol ID: 45568

Title of Project: Managers’ perceptions of strategic workforce planning and organizational alignment: A single case study analysis

Principal Investigator: Rashed A. Alzahmi
The Pennsylvania State University
315 Keller Building
University Park, PA 16802
+1 (814) 777-0008; (050) 779-9697
raa5@psu.edu

Advisor: Dr. William J. Rothwell
305 Keller Building, University Park, PA 16803
(814) 863-2581, wjr9@psu.edu.

1. **Purpose of the Study:** The purpose of this study is to investigate how Abu Dhabi National Oil Company (ADNOC) and its Group of Companies perceive their strategic workforce planning (SWP) and organizational alignment. Findings from this study will assist in understanding human capital system development in the organization and identify the key business factors that may make strategic workforce planning more effective.

2. **Procedures to be followed:** We request your participation in a 60-minute interview to learn about your perceptions of strategic workforce planning and organizational alignment in your company.

   With your permission, the interview will be recorded and transcribed. The purpose of the transcription is to provide a faithful record of ideas, and to allow for direct quotes to be used with your permission. You will be asked to review the transcription of the interview to confirm that the data collected is accurate. The audiotapes used for recording the session will be stored in a locked file cabinet for 36 months from the date of the interview and then destroyed. During the 36-month period, only the principal researcher and research assistant will have access to the tapes.

3. **Discomforts and Risks:** There are no risks associated with participating in this research beyond those experienced in everyday life.

4. **Benefits:**
   a. You might learn more about your company by participating in this study.
   b. You may have the opportunity to reflect upon interventions you were involved with in the past and how they could be improved.
   c. This study may reinforce the importance of your role in the organization.
   d. You will receive an executive summary regarding the findings from the study.
5. **Duration:** The interview will last approximately sixty minutes.

6. **Statement of Confidentiality:** Only the person in charge will know your identity. If this research is published, no information that would identify you will be revealed. With your permission, direct quotes from the interview may be used, but company names and the names of people will be omitted. Your confidentiality will be maintained to the degree permitted by the technology used.

7. **Right to Ask Questions:** Please contact Rashed A. Alzahmi at +1 (814) 777-0008 or (050) 779-9697 with questions or concerns about this study. You may also contact the researcher’s faculty advisor, Dr. William J. Rothwell at +1 (814) 863-2581. If you have questions about your rights as a research participant, contact Penn State’s Office for Research Protections at +1 (814) 865-1775.

8. **Voluntary Participation:** Your participation in this study is entirely voluntary. You may decline to answer specific questions or end your participation in the interview at any time. Refusal to take part in or withdrawing from this study will involve no penalty or loss of benefits you would receive otherwise.

9. **Compensation:** There is no monetary compensation associated with participation in this research.

You must be 18 years of age or older to participate in this research study. If you consent to participate in this research study and to the terms above, please sign your name and indicate the date below.

You will be given a copy of this consent form to keep for your records.

**Participant:**
Signature:
Date:
The informed consent procedure has been followed.

**Investigator Signature:**
Date
APPENDIX F
Permission to Use Data

Permission to Use Data

To: Abu Dhabi National Oil and Gas Company (ADNOC) and its Group of Companies
From: Rashed A. Alzahmi
Sub: Request for permission to use the collected data in a research study

Thank you so much for participating in my research study titled “Managers’ perceptions of strategic workforce planning and organizational alignment: A single case study analysis” and for granting me access to your companies. The findings of the study could provide the rationale for improving the process of workforce planning and its place in the strategic planning system of ADNOC and its Group of Companies.

With your permission, the researcher will use the data collected (interviews, documents, and archival records) from ADNOC and its Group of Companies for the purpose of this research study. He will also cite and recognize the organization’s name in his Ph.D dissertation and any future publication.

Please note that the participants will not be identified by names and the information obtained during this study will only be used for academic research purposes.

If you consent to the above, please simply sign and indicate the date below.

Thank you again for your support, cooperation, and participation in my research study.

**Participant:** Abu National Oil Company (ADNOC) and its Group of Companies

Name: Faisal Mohamed Al Ali

Title: ADNOC Scholarship Division Manager

Signature:

Date: 29-09-2015

**Investigator:** Rashed A. Alzahmi

Signature:

Date:
## APPENDIX G
List of Some of the Collected Documents and Archival Data

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<thead>
<tr>
<th>#</th>
<th>Documents</th>
<th>#</th>
<th>Archival Data</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction to oil and gas industries and an orientation of ADNOC &amp; its Group of Companies Handbook</td>
<td>1</td>
<td>ADNOC Organization Charts</td>
</tr>
<tr>
<td>2</td>
<td>ADNOC Employee Handbook</td>
<td>2</td>
<td>GASCO Organization Charts</td>
</tr>
<tr>
<td>3</td>
<td>ZADCO Employee Handbook</td>
<td>3</td>
<td>The Petroleum Institute compensation and Benefits Package</td>
</tr>
<tr>
<td>4</td>
<td>ADGAS Employee Handbook</td>
<td>4</td>
<td>Financial and Accounting-manual</td>
</tr>
<tr>
<td>5</td>
<td>The Glenelg School of Abu Dhabi Faculty Handbook</td>
<td>5</td>
<td>Censes of Employees in training and educational leave</td>
</tr>
<tr>
<td>6</td>
<td>ADNATCO &amp; NGSCO Booklet</td>
<td>6</td>
<td>Recruitment of UAE nationals holding PhD</td>
</tr>
<tr>
<td>8</td>
<td>ADNOC &amp; its Group of Companies: Corporate Brochure</td>
<td>8</td>
<td>ADNOC Group grade and salary structure</td>
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<tr>
<td>10</td>
<td>ADNOC Distribution Sustainability Report 2014</td>
<td>10</td>
<td>ADNOC Staff performance Management</td>
</tr>
<tr>
<td>11</td>
<td>BOROUGE Sustainability Report 2014</td>
<td>11</td>
<td>Encashment of Annual Housing Rental Entitlement</td>
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<tr>
<td>12</td>
<td>ADNOC Sustainability Report 2013</td>
<td>12</td>
<td>ADNOC Group Compensation Package</td>
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<tr>
<td>13</td>
<td>ADNATCO &amp; NGSCO: Sustainability Report 2013</td>
<td>13</td>
<td>Manpower Budget and Plan Preparation Data</td>
</tr>
<tr>
<td>14</td>
<td>ESNAD Annual Sustainability Report 2013</td>
<td>14</td>
<td>General salary increase implementation guidelines for ADNOC Group</td>
</tr>
<tr>
<td>15</td>
<td>ADCO Code of Business Conduct Booklet</td>
<td>15</td>
<td>Children’s Education Benefits</td>
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<tr>
<td>16</td>
<td>GASCO Code of Business Conduct Booklet</td>
<td></td>
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</tr>
</tbody>
</table>
VITA

Rashed A. Alzahmi

Academic Credentials

The Pennsylvania State University, University Park, USA
M.S. in Workforce Education and Development 2003
B.S. in Workforce Education and Development 2001
Pennsylvania College of Technology, Williamsport, USA
A.A.S. in Accounting 1999

Professional Experience

Abu Dhabi National Oil Company (ADNOC), UAE
Head of Scholarship Department 2006–2010
Acting Head of Scholarship Department 2004–2006

Publications


