



# Current State of the Interstate Natural Gas Pipeline Industry

Presented by Brad Kamph  
President, Interliance Consulting, Inc.

# Workforce Business Case

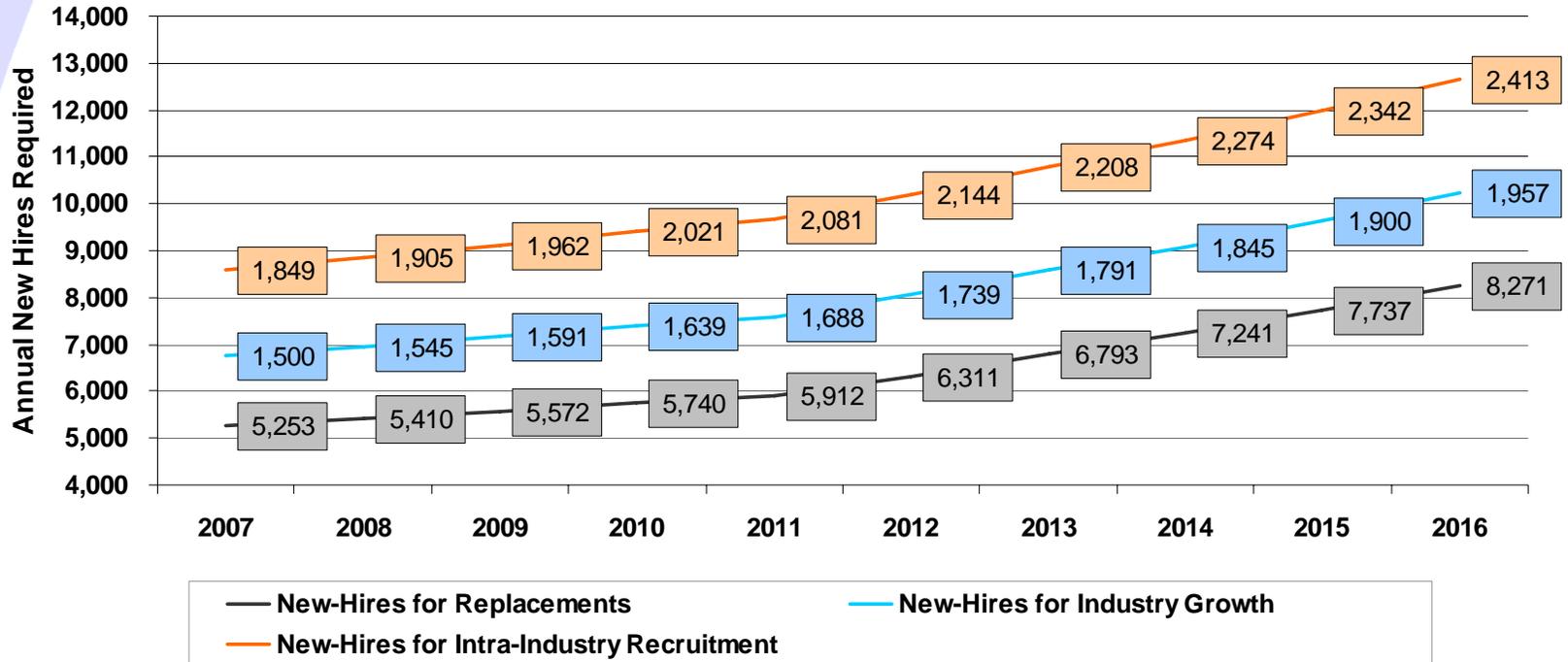
- The data from the INGAA Foundation Workforce Study indicates that the attrition of employees is costing the industry over **\$575,000,000** per year.
  - \$90M - retirement attrition
  - \$485M - non-retirement attrition
- Without proactive steps by industry and individual companies, this number is expected to grow to **\$780,000,000** in five years.

# Key findings point to gaps in information and communications

- Most managers feel workforce issues will have a significant impact on their ability to do business within two years.
- A major disconnect exists between executives and management regarding the approach, resources and business imperatives.
- Many companies have been focusing on a piecemeal approach, rather than a comprehensive strategy.
- Industry groups and associations are focusing on pieces rather than overall strategy.
- Companies are focusing on “aging workforce” rather than skills at risk and business case return.
- Eighty-seven percent of companies do not have a goal for limiting non-retirement attrition.
- Intra-company recruiting costs the industry \$165M per year.

# Intra-industry recruitment and the growing natural gas infrastructure add to recruitment requirements

**Recruitment Requirements for the Natural Gas Transmission Industry**

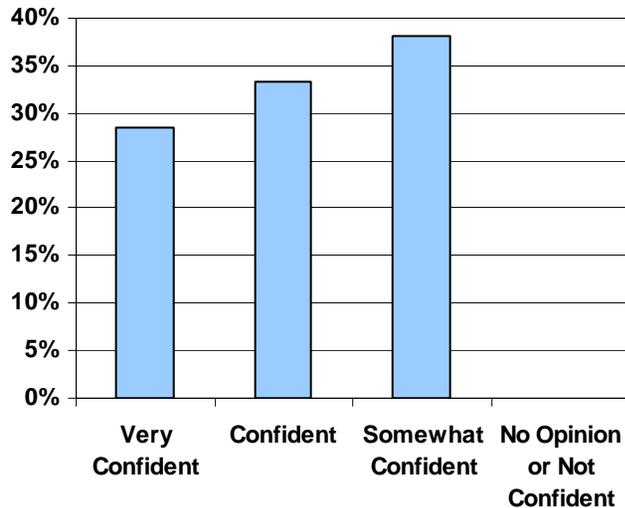


Intra-industry recruiting adds 22% to recruitment requirements and costs the industry \$165M in added recruitment costs and lost productivity.

# Executives and managers do not assess the workforce risks equally

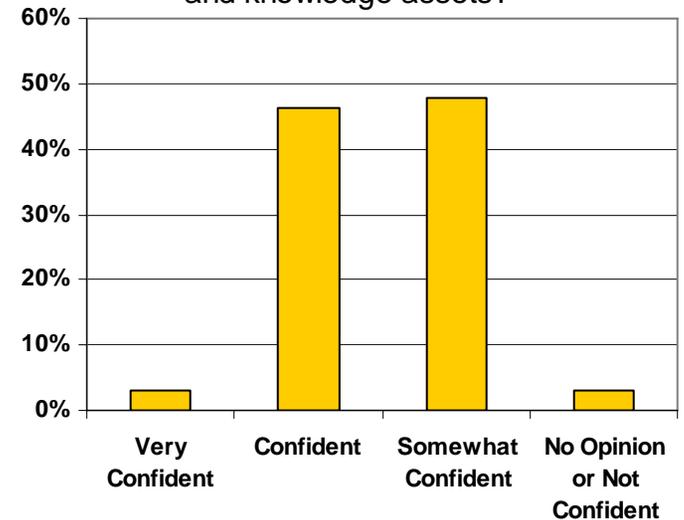
## Executive Interviews

Do you feel your company will be able to successfully maintain your workforce and knowledge assets?



## Manager's Survey

Do you feel your company will be able to successfully maintain your workforce and knowledge assets?



When managers were asked:

Do you have sufficient time and resources to plan and implement workforce and knowledge initiatives?

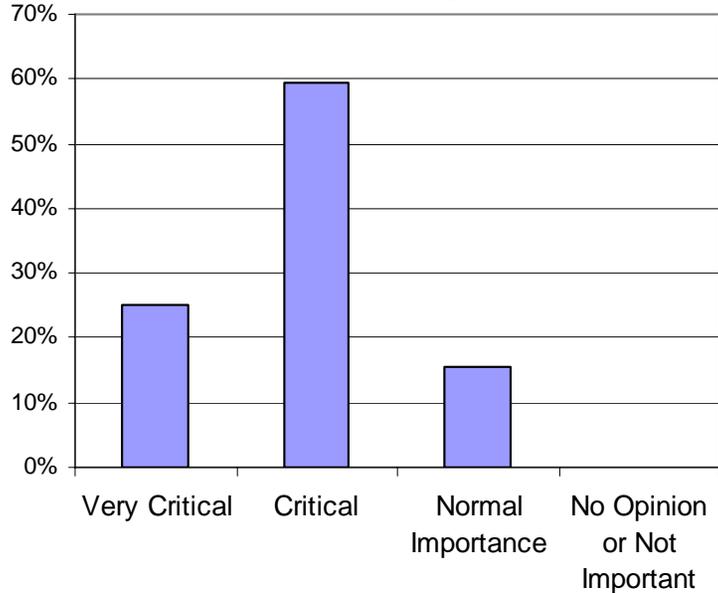
1 in 20 managers reported having sufficient time

1 in 7 reported receiving additional resources for workforce initiatives

# Survey respondents from the service companies consider workforce a higher priority

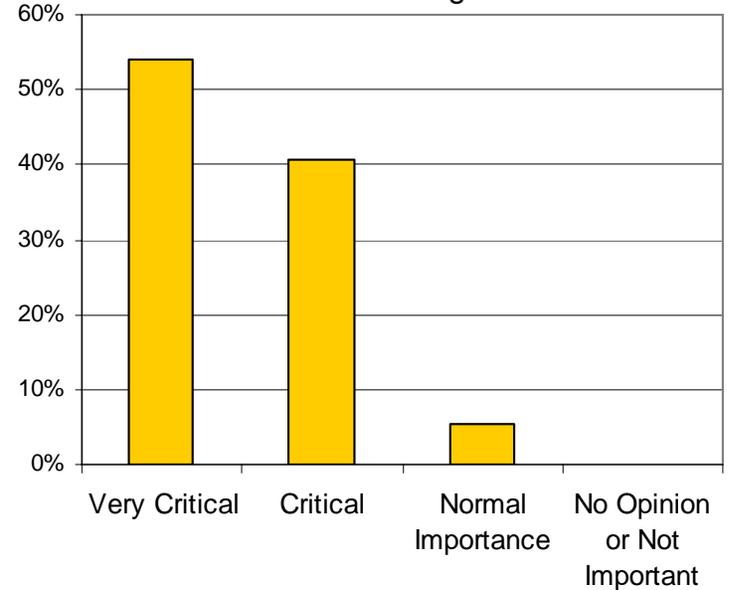
## Pipeline Company

How do you rate safeguarding your workforce and knowledge assets?



## Service Company

How do you rate safeguarding your workforce and knowledge assets?



The cyclical nature of the industry is more likely to affect the headcount requirements in the service companies.