

LOCAL CONTENT MASTERCLASS 2023 COURSE OUTLINE



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or email training@dai.com



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A woman with curly hair, wearing a white hard hat and safety glasses, is focused on a control panel with many buttons. She is also wearing a yellow safety vest over a white shirt. The background is blurred with warm, bokeh light effects.

Local Content Masterclass Overview

Since mid-2015, the topic of local content has moved center stage, and with it the need for adaptive professionals to implement rapidly evolving local content compliance regimes and deliver tangible local benefits as a balance to globalization. Today, in upending the supply chain world order, the COVID-19 pandemic is redefining how we source goods and labor. Companies and governments should not wait for this current pandemic to run its course before launching initiatives to reimagine their use of local content—and they certainly shouldn't wait for the next global shock to force their hand.

The following training modules have been developed from DAI's globally recognized Local Content Masterclass, which has been operating for more than 10 years and trained more than 500 practitioners globally. DAI is a British Accreditation Council-accredited short-course provider.



Past Participants Include:

- National and international energy and mining companies
- National and international companies involved in other capital-intensive sectors such as infrastructure, transportation, utilities, and water management
- Government policy-making authorities
- Host-country regulatory agencies
- International and large-scale domestic contractors/suppliers
- Local supplier business and trade associations
- Specialists from international development agencies and development finance institutions

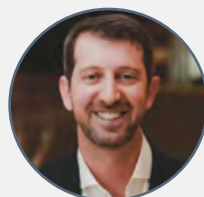
Houston, Texas, U.S.

- **16 – 18 October, 2023**
- **9am – 5pm**
- **To register, visit dai.com/masterclass**
- Lunch and snacks throughout the 3 days will be provided
- Course materials will be provided

“Certainly the prime local content course in the market. Highly recommended.”

*Local Content Manager,
international oil field services
company*

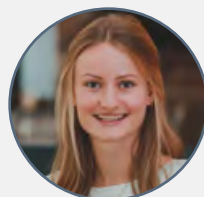
Training Team



Zachary Kaplan
Vice President,
Sustainable Business Group



Dorival Bettencourt
Director,
Sustainable Business Group



Tate Crowards
Training Manager,
Sustainable Business Group

**Day
01**

Local Content Policy, Regulation and Forecasting

Development Context

From Indonesia to Nigeria, governments are rethinking local content. Now, more than ever, countries and companies are trying to identify effective measures to drive local sustainable development when sourcing or making new investments. This challenge is particularly hard when seeking to find the right balance between promoting the use of local enterprises and workforces without compromising other critical factors such as cost competitiveness, quality, safety, and schedule. Sourcing locally and using new private sector investments to catalyze local economic growth—local and national content—is growing in importance across all sectors of the global economy.

This course takes practitioners from both the private and public sectors through the theory, definition, and implementation of appropriate and well-balanced local and national content policies, at the government, corporate, or project level. It examines various local content laws, regulations, and policies around the world and assesses their effectiveness. It also trains participants on alternative private sector approaches, at the corporate or project level, to developing successful local and national content development policies and plans. Additionally, participants learn the latest practices in determining how to measure local supply chain capacity as well as skill levels and qualifications in the local workforce to inform their local engagement strategies. They also learn how to translate the results of such forecasts and scenario analyses into local content plans that reflect how local economic impact can be achieved most effectively.

Core topics covered

- Local/national content origins, economic theory, and definitions
- Global political economy of local content
- Experiences with local/national content—what has worked and what has not
- Principles and methodology for determining a fit-for-purpose local content strategy and/or policy development approach
- Core elements of a robust local content strategy and/or policy
- International trade implications
- Methodology for developing a local content strategy and/or policy
- Case studies with analysis of local content laws, regulations, and policies
- Understanding of supply and demand for local content
- Local content forecasting methodologies and mapping the local industrial base (enterprises and workforce)

Local Content Plans, Procurement and Reporting

Development Context

This module prepares participants to forecast local content scenarios linked to the procurement of goods and services and the employment of workforces for large projects. Participants will gain exposure to new procurement, contract tendering, and evaluation techniques that reposition local content as a core element in sourcing goods and services competitively. Additionally, this module trains practitioners on the methods for selecting the right metrics and key performance indicators (KPI); establishing the right data collection and analysis processes and standards; and “telling the story.” This module is about becoming comfortable with identifying the right metrics. Practitioners will learn how to evaluate impact correctly and use the analytical results to improve local content reporting and performance. Participants gain an understanding of the expectations and interests of various stakeholder groups and how to create engagement and communication strategies that use empirical evidence to spur collaboration and drive improvements in stakeholder relations and local content performance over time.

Core topics covered

- Developing a local content plan
- Contracting and tendering strategies
- How to integrate local content into procurement procedures
- Data governance and collection systems, processes, and methods
- Selecting the right metrics, KPIs, and impact measures
- Understanding and interpreting data
- Communicating results and engaging key stakeholders
- Identifying the right digital solutions to streamline reporting

Day
03

Local Supplier Development

Development Context

Investing in local content can take many forms. The past 15 years have seen major advances in the ways companies and governments invest in building the capacity of local SMEs and workers in a way that is economically viable and sustainable. This module teaches participants how to use data and analytics to structure capacity building and local content programs that are commercially effective and economically beneficial. Participants learn how to diagnose gaps in the local supply chain—from enterprises to individual workers—and design and implement programs to address these gaps. Key to this approach is stakeholder engagement and sustainability planning.

This module will also cover local content policies and development programs that have been implemented for the renewables sector, primarily wind, hydrogen, and utility-scale solar. The module will help participants to understand global energy trends and political economy factors driving renewables transitions.

Core topics covered

- Supplier evaluation and gap assessment methodology
- Using online registration and pre-qualification portals and tools
- Assessing local workforce skills and qualifications
- Evaluating supplier financing needs and mechanisms to support
- Using different drivers to develop entrepreneurship and innovation programs
- Measuring local training capacity of technical, vocational, and higher education institutions
- Designing and implementing local content—supplier and workforce—development programs
- Review how local content is being achieved in the renewables sector

Lead Trainers

Our expert trainers are development practitioners themselves and rely on data and analytics to craft the course material using real case studies to apply theory to practice.



Zachary Kaplan

Vice President, Sustainable Business Group

Zachary Kaplan has more than 15 years' experience within the energy industry, focusing on local content and policy, and leads activities related to local content, corporate social investment, and supplier development.

- Technical Advisor to local content supplier development programs worldwide
- Assesses local supplier capacity for upgrade to enter global supply chains and facilitates foreign direct investments via joint ventures
- Key architect behind the development of DAI's proprietary local content methodologies and tools currently deployed across the globe
- Spearheaded a local content Regime Analysis in Ghana, Nigeria, Brazil, Trinidad and Tobago, Tanzania, Papua New Guinea, and Uganda, to assess the impacts of local content regimes



Dorival Bettencourt

Director, Sustainable Business Group

Dorival Bettencourt has more than 10 years' experience in energy investment, with technical expertise in all aspects of local content strategy, policy, analytics and implementation. He has led dozens of engagements for private and public sector clients around the world.

- Leads and oversees industrial baseline assessments for major oil and gas investments globally
- Designs and implements local content stakeholder engagement strategies across DAI's portfolio
- Extractive Industry Lead for U.S. Agency for International Development-funded private sector development and competitiveness program in Mozambique

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