MANAGEMENT OF EPC, EPCM AND PETROLEUM SERVICES CONTRACTS

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GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Introduction

Engineering, Procurement, and Construction (EPC) contracts, Engineering, Procurement, and Construction Management (EPCM) agreements, and petroleum services contracts play a central role in delivering complex energy projects. Each contracting model establishes different responsibilities, commercial obligations, and risk-sharing arrangements.

The Management of EPC, EPCM and Petroleum Services Contracts Training Course, provided by Gentex Training Center, develops practical expertise in selecting, negotiating, administering, and controlling these agreements. Participants explore contract structures, FIDIC conditions, procurement strategies, contractor performance, and dispute prevention. Furthermore, the program addresses cost control, variations, claims, and project completion. Through industry-focused exercises, participants strengthen their ability to manage contractual obligations and support successful petroleum and energy project delivery.

Course Objectives

- Distinguish between EPC, EPCM, and petroleum services contracting models, including their commercial structures, responsibilities, and applications across upstream, midstream, and downstream projects.

- Evaluate contract delivery strategies using project complexity, owner capabilities, technical requirements, financial exposure, and risk allocation criteria.

- Interpret relevant FIDIC contractual frameworks, including the Silver Book for EPC/turnkey projects and the White Book for consultancy services.

- Develop effective scopes of work, technical specifications, responsibility matrices, deliverables, and contractual performance requirements.

- Assess tender documents, contractor qualifications, bid evaluation matrices, and commercial proposals to support transparent contractor selection.

- Negotiate essential contractual provisions covering pricing, payment milestones, warranties, performance guarantees, indemnities, and limitations of liability.

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- Identify and allocate project risks through structured risk registers, responsibility allocation matrices, insurance provisions, and contractual risk assessments.
- Administer contract execution using progress reporting, change control procedures, payment certification, and contractor performance indicators.
- Evaluate variations, extensions of time, delay damages, disruption claims, and dispute resolution mechanisms through documented contractual procedures.
- Manage testing, commissioning, acceptance, defects obligations, final account settlement, and contract closeout requirements for petroleum facilities and associated services.

Course Methodology

- Expert-led sessions: Examine EPC, EPCM, and petroleum services contracting principles through structured technical discussions.
- Contract analysis: Review selected FIDIC Silver Book and White Book provisions alongside petroleum services agreement clauses.
- Practical workshops: Develop risk registers, responsibility matrices, bid evaluation tools, and contract administration checklists.
- Industry case studies: Assess variations, contractor delays, cost overruns, and performance disputes.
- Applied exercises: Practice contract negotiations, claims evaluation, and closeout planning using realistic energy project scenarios.

Who Should Take This Course

- Contract managers and contract administrators responsible for engineering, construction, and petroleum services agreements.
- Procurement, sourcing, and commercial managers involved in contractor selection and contractual negotiations.

- Project managers and project controls specialists overseeing oil, gas, and energy infrastructure developments.
- Petroleum engineers, construction engineers, and technical managers coordinating engineering and service contractors.
- Legal advisers, compliance professionals, and risk managers handling contractual obligations and disputes.
- Asset owners, operations managers, and business development professionals managing petroleum service providers.

Management of EPC, EPCM and Petroleum Services Contracts Course Outlines

Day 1: EPC, EPCM and Petroleum Contracting Fundamentals

- Structure and commercial characteristics of EPC, EPCM, and petroleum services agreements.
- Differences in contractual relationships, project ownership, management responsibilities, and delivery obligations.
- Contracting strategies for upstream, midstream, downstream, and energy infrastructure projects.
- FIDIC Silver Book, White Book, and other relevant contracting frameworks.
- Scope of work development, technical specifications, deliverables, and contractual interfaces.
- Risk allocation principles and preparation of a project responsibility assignment matrix (RACI).

Day 2: Contract Development, Tendering and Negotiation

- Contract preparation, tender packages, requests for proposals (RFPs), and prequalification requirements.
- Technical and commercial bid evaluation using weighted scoring matrices and evaluation criteria.
- Contract pricing structures: lump sum, reimbursable, unit rates, and time-based service arrangements.
- Negotiation of payment terms, milestone schedules, guarantees, warranties, and liability limitations.
- Review of indemnities, insurance requirements, intellectual property, and confidentiality provisions.
- Contract award procedures, negotiation records, and development of contract management plans.

Day 3: Contract Administration and Performance Control

- Contract mobilization, kick-off procedures, communication protocols, and governance responsibilities.
- Monitoring engineering, procurement, construction, and petroleum service deliverables against contractual schedules.
- Application of work breakdown structures (WBS), milestone tracking, and earned value management (EVM).
- Contractor performance monitoring through key performance indicators (KPIs) and progress reporting.

- Management of invoices, payment certification, cash flow, and commercial documentation.
- Change control procedures, variation orders, contract registers, and approval authorities.

Day 4: Contractual Risk, Claims and Dispute Management

- Identification and evaluation of technical, commercial, financial, and operational contract risks.
- Development of risk registers, mitigation plans, and contractual responsibility allocation strategies.
- Management of schedule delays, extensions of time (EOT), disruption, and liquidated damages.
- Claims identification, contractual notices, supporting evidence, and contemporaneous recordkeeping.
- Application of critical path method (CPM) analysis to delay and extension-of-time assessments.
- Dispute avoidance, negotiation, mediation, adjudication, arbitration, and contractual escalation procedures.

Day 5: Petroleum Services Management and Contract Closeout

- Contract management considerations for drilling, well services, maintenance, and petroleum equipment support.
- Management of contractor interfaces, operational readiness, HSE obligations, and service performance standards.

- Testing, commissioning, mechanical completion, performance testing, and acceptance procedures.
- Management of defects, warranty periods, outstanding work, and contractual punch lists.
- Final account reconciliation, retention release, contract securities, and settlement of outstanding claims.
- Contract closeout checklists, lessons learned, performance evaluation, and continuous improvement planning.

Conclusion

By successfully completing the Management of EPC, EPCM and Petroleum Services Contracts Training Course, participants will gain a comprehensive understanding of contract structures, procurement strategies, risk allocation, and commercial administration within the energy industry. They will acquire practical knowledge of contract negotiation, contractor performance management, claims assessment, and dispute prevention. Furthermore, they will understand the contractual requirements for project completion and closeout. Gentex Training Center delivers this program to strengthen informed decision-making, contractual compliance, and effective management of complex petroleum and infrastructure projects.

FAQs

Q1 What is the Management of EPC, EPCM and Petroleum Services Contracts course about?

The course explains how organizations structure, negotiate, administer, and close out EPC, EPCM, and petroleum services agreements. It examines contractual responsibilities, procurement procedures, risk allocation, performance monitoring, and claims management across engineering, construction, and oil and gas operations.

Q2 What are the key benefits of the Management of EPC, EPCM and Petroleum Services Contracts course?

The program strengthens contractual decision-making, improves commercial control, and helps organizations identify risks before they affect project delivery. It also develops practical approaches to contractor oversight, cost management, variation control, dispute prevention, and efficient project closeout.

Q3 What skills will I gain from the Management of EPC, EPCM and Petroleum Services Contracts course?

Participants develop four essential professional skills: EPC and EPCM Contract Administration, Petroleum Contract Risk Management, Contract Negotiation and Claims Management, and Contractor Performance and Compliance Management. These competencies support effective contract implementation, commercial decisions, and operational oversight.

Q4 What tools, methods, or standards are covered in the Management of EPC, EPCM and Petroleum Services Contracts course?

The program examines the FIDIC Silver Book and White Book, responsibility assignment matrices (RACI), risk registers, work breakdown structures (WBS), earned value management (EVM), and critical path method (CPM). Participants also practice bid evaluation and contract change control procedures.

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Q5 How is the Management of EPC, EPCM and Petroleum Services Contracts course applied in real-world practice?

Organizations apply these principles when awarding construction packages, managing engineering consultants, monitoring drilling service providers, negotiating contract variations, and evaluating delay claims. Practical contract administration supports documented decisions, clearer contractor responsibilities, financial control, and orderly completion of petroleum projects.