Professional Certificate in Upstream Commercial Management, Contracts and

GExperts Learning Academy | PC-039 | PC | 14 weeks

Course overview

14 weeks PC programme focused on Professional Certificate in Upstream Commercial Management, Contracts and Procurement, using energy-sector cases and applied decisions.

Designed for: Learners appropriate to the stated programme level

Learning outcomes

- Explain core principles and terminology for Professional Certificate in Upstream Commercial Management, Contracts and Procurement.
- Interpret an applied case using evidence and stated assumptions.
- Identify risks, safeguards, role boundaries and escalation points.
- Prepare a clear recommendation for a multidisciplinary audience.

Course guide

Work through each module objective, lesson and teaching note, complete the applied activity and assessment, then use the separate Academy practice page for practice questions and answer feedback.

Separate practice questions:
https://www.globalexpertsconsultoria.com/training/academy/courses/questions/?course=PC-039

Academic and certification status

Draft learning resource for study and review. It does not confer accreditation, external certification, a regulated qualification, professional licence, safety-critical competence or site authorisation. Confirm approvals, current laws, standards, approved procedures and awarding-body requirements before delivery.

Module 1: Contract strategy and risk allocation

Learning objectives

- Explain contract strategy and risk allocation, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Contract strategy and risk allocation

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Contracts define scope, deliverables, payment, acceptance, change and remedies. Lump sum, reimbursable and target-cost arrangements allocate uncertainty differently. Begin with scope maturity and market capability rather than choosing a familiar contract label.

Decision logic. Risk should be allocated to parties able to manage it, with realistic pricing and assurance. Unclear interfaces create disputes despite detailed clauses. Actual indemnity, liability, insurance and governing-law terms require qualified legal and commercial review.

Worked example. A supplier prices an undefined offshore interface as an exclusion; the owner's total risk remains unresolved.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Draft a scope and interface schedule for a fictional package.

Model answer guide. Include deliverables, acceptance evidence, owner interfaces, change control and exclusions.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Draft a scope and interface schedule for a fictional package.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 2: Joint operating agreements

Learning objectives

- Explain joint operating agreements, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Joint operating agreements
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. A joint operating agreement allocates responsibilities among venture participants. Explain operator, non-operator, voting, work programmes, budgets, cash calls and joint account oversight. A JOA does not necessarily govern the state's licensing relationship.

Decision logic. Review how authority, reserved matters and conflicts are handled. Non-operators need information and assurance rather than assuming the operator absorbs every risk. Examine default, transfer and decommissioning provisions with legal review in actual transactions.

Worked example. A proposed budget change exceeds an operator's delegated authority in a fictional venture.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Identify the required decision route from a simplified authority matrix.

Model answer guide. Refer to the agreed voting and delegation provisions, record conflicts and retain the decision trail.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Identify the required decision route from a simplified authority matrix.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 3: Procurement and supplier qualification

Learning objectives

- Explain procurement and supplier qualification, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Procurement and supplier qualification

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Procurement translates a defined need into sourcing, evaluation, award and contract management. Separate mandatory eligibility, technical acceptance and commercial comparison. Clear specifications and evaluation criteria should exist before bids are opened.

Decision logic. Manage conflicts, confidentiality and fair treatment. Lowest price may not be lowest evaluated cost if quality, delivery and lifecycle support differ. Document decisions and follow delegated authority; this classroom exercise awards no real contracts.

Worked example. A low bid excludes offshore mobilisation while another includes it.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Normalise three fictional bids and prepare an evaluation recommendation.

Model answer guide. Compare like-for-like scope, clarify exclusions and include risk with an auditable decision basis.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Normalise three fictional bids and prepare an evaluation recommendation.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 4: Contract and vendor performance

Learning objectives

- Explain contract and vendor performance, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Contract and vendor performance
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Vendor management checks delivery against agreed scope, quality, schedule, HSE and commercial terms. Define measurable acceptance criteria and evidence. Relationship quality helps but does not replace objective verification.

Decision logic. Use proportionate reviews, corrective actions and escalation. Indicators can conflict: on-time delivery of defective items is poor performance. Changes require controlled agreement. Preserve records needed for payment, warranty and learning.

Worked example. A supplier meets delivery dates but repeatedly submits incomplete quality dossiers.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Develop a balanced performance scorecard and corrective-action request.

Model answer guide. Include first-time quality, documentation, delivery and action effectiveness with accountable dates.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Develop a balanced performance scorecard and corrective-action request.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 5: Dispute prevention and resolution

Learning objectives

- Explain dispute prevention and resolution, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Dispute prevention and resolution

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Disputes often begin with ambiguity, undocumented change or inconsistent expectations. Teach contemporaneous records, issue escalation and contractual notice awareness. Separate technical disagreement from entitlement and relationship management.

Decision logic. Map negotiation, mediation, expert determination, arbitration or litigation only as options governed by actual agreements and law. Protect privileged or sensitive information and obtain legal advice where needed. Never invent notice periods or enforceability claims.

Worked example. A contractor requests extra payment for changed access conditions but the instructions and impact records are incomplete.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Assemble an issue chronology and identify evidence gaps.

Model answer guide. Separate established facts, disputed facts, contract questions and commercial options.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Assemble an issue chronology and identify evidence gaps.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 6: Professional Certificate in Upstream Commercial Management, Co

Learning objectives

- Explain professional certificate in upstream commercial management, contracts and procurement: data and performance, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Data and Performance

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Data and Performance describes a practical part of Professional Certificate in Upstream Commercial Management, Contracts and Procurement. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for professional certificate in upstream commercial management, contracts and procurement: data and performance. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans professional certificate in upstream commercial management, contracts and procurement: data and performance while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: data and performance: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: data and performance: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 7: Professional Certificate in Upstream Commercial Management, Co

Learning objectives

- Explain professional certificate in upstream commercial management, contracts and procurement: applied case, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Applied Case

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Applied Case describes a practical part of Professional Certificate in Upstream Commercial Management, Contracts and Procurement. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for professional certificate in upstream commercial management, contracts and procurement: applied case. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans professional certificate in upstream commercial management, contracts and procurement: applied case while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: applied case: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: applied case: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 8: Professional Certificate in Upstream Commercial Management, Co

Learning objectives

- Explain professional certificate in upstream commercial management, contracts and procurement: communication and escalation, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Communication and Escalation

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Communication and Escalation describes a practical part of Professional Certificate in Upstream Commercial Management, Contracts and Procurement. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for professional certificate in upstream commercial management, contracts and procurement: communication and escalation. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans professional certificate in upstream commercial management, contracts and procurement: communication and escalation while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: communication and escalation: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: communication and escalation: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 9: Professional Certificate in Upstream Commercial Management, Co

Learning objectives

- Explain professional certificate in upstream commercial management, contracts and procurement: knowledge check, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Knowledge Check

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Knowledge Check describes a practical part of Professional Certificate in Upstream Commercial Management, Contracts and Procurement. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for professional certificate in upstream commercial management, contracts and procurement: knowledge check. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans professional certificate in upstream commercial management, contracts and procurement: knowledge check while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: knowledge check: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: knowledge check: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 10: Professional Certificate in Upstream Commercial Management, C

Learning objectives

- Explain professional certificate in upstream commercial management, contracts and procurement: competence review, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Competence Review

2. Systems and operating context

3. Evidence, assumptions and decision gates

4. Hazards, safeguards and escalation

5. Applied case: Professional Certificate in Upstream Commercial Management, Contracts and Procurement

Detailed teaching notes

Teaching notes

Core explanation. Professional Certificate in Upstream Commercial Management, Contracts and Procurement: Competence Review describes a practical part of Professional Certificate in Upstream Commercial Management, Contracts and Procurement. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for professional certificate in upstream commercial management, contracts and procurement: competence review. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans professional certificate in upstream commercial management, contracts and procurement: competence review while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: competence review: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for professional certificate in upstream commercial management, contracts and procurement: competence review: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Facilitator close-out and resources

Facilitator close-out

Record attendance, assessment evidence, learner support needs, incidents and improvement actions according to approved provider processes. Do not sign learners off for regulated or safety-critical work without the authorised assessment and certification route.

Resources and references

- Supplied GExperts/IUM reference materials; verify reuse rights and currentness.
- Current applicable Namibian legislation, standards and approved site procedures supplied by the provider.
- Case worksheet and instructor slides must be produced and reviewed before course release.