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COURSE BROCHURE

Energy Contract Management Phases from Tendering to Close-Out Training Course

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New York

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Registered in the United Kingdom and Saudi Arabia

Energy Contract Management Phases from Tendering to Close-Out Training Course

Ref: 3210_126401 **Date:** 15 – 19 November 2027 **Location:** New York **Fees:** 7900 GBP

Energy Contract Management Phases from Tendering to Close-Out is a 1-week training course for contract managers, project engineers and commercial staff in power and energy companies, in which each participant builds a phase-by-phase contract risk and control map. Power plants, substations and transmission lines are delivered through long contracts where a weak tender or a missed notice can cost more than the equipment itself. Jupiter Prime Training runs this Energy Contract Management Phases course.

Why Energy Contract Management Phases Matter Now

Three forces shape energy contracting today. Owners are tendering more generation, grid and storage packages at once. Supply chains for transformers, cables and switchgear remain tight, so delivery slippage and price adjustment claims are frequent. Lenders and boards expect records of how each variation was approved. An organisation that controls each phase in turn keeps scope, cost and schedule aligned; one that treats the contract as paperwork after signature finds disputes surfacing at close-out.

Who Gains Most from Energy Contract Management Phases

- Staff who prepare tender packages, evaluation criteria and bidder clarifications
- Engineers who define technical scope, acceptance tests and performance levels
- Contract administrators who issue notices, track variations and certify payments
- Commercial staff who assess price adjustment, liquidated damages and bonds
- Project controllers who link contract milestones to schedules and cost forecasts

A project unit that sends its tendering, engineering and commercial members together gains most.

Energy Contract Management Phases Capabilities

These outcomes follow a power or energy contract from the first scope note to final account.

- Design a tender strategy and evaluation matrix that balances price, technical merit and delivery risk — award recommendation
- Specify scope, interfaces and acceptance criteria that limit later variations — engineering sign-off
- Build a mobilisation checklist covering bonds, insurances, key personnel and baseline schedule — contract start
- Assess variation requests and price adjustments against contract terms and evidence — commercial approval
- Apply key performance indicators and notice registers to monitor contractor performance — monthly progress meetings
- Test close-out readiness through punch lists, defects liability and final account reconciliation — release of retention

Key Energy Contract Management Phases Terms

- Pre-Award Phase — the stage of planning, packaging, tendering and evaluation before a contract is signed.
- Mobilisation — the period after award when the contractor provides bonds, staff, plans and site set-up.
- Variation — an instructed change to scope, sequence or quality that may adjust the contract price or time.
- Liquidated Damages — a pre-agreed sum payable by the contractor for late completion or a performance shortfall.
- Notice Register — a log of every contractual notice sent or received and its response.
- Final Account — the agreed statement of the total contract value after all variations, claims and deductions.

Energy Contract Management Phases Day by Day

Day 1: Contract Strategy and the Energy Project Lifecycle

- Three-Phase Contract Lifecycle Map — Where Risk Moves from Owner to Contractor
- Packaging Options for Plants, Substations and Lines — Interface Risk Between Packages
- Turnkey, Supply-Only and Construction Contract Types — Choosing Risk Allocation
- Payment Mechanisms: Lump Sum, Remeasured and Milestone — Cash Flow and Control Trade-Offs
- Contract Risk Register by Phase — Early Ownership of Commercial Exposure

Day 2: Pre-Award Planning and Tendering

- Scope of Work and Technical Specification Drafting — Reducing Later Variation Requests
- Prequalification Criteria for Bidders — Capacity, Experience and Financial Strength
- Tender Clarifications and Addenda Control — Fair Treatment of All Bidders
- Technical and Commercial Evaluation Matrix — Defensible Award Recommendations
- Pre-Award Negotiation of Exceptions and Deviations — Closing Gaps Before Signature

Day 3: Award and Mobilisation

- Letter of Award and Contract Execution Checklist — Avoiding Gaps at Signature
- Performance Bonds, Advance Payment Security and Insurances — Owner Security at Start
- Kick-Off Meeting and Contract Handover Pack — Shared Understanding of Obligations
- Baseline Schedule and Payment Milestone Approval — Measuring Progress Fairly
- Roles, Authority Limits and Communication Protocols — Who Signs Which Instruction

Day 4: Post-Award Administration and Close-Out

- Variation Order Procedure and Valuation — Approving Changes to Price and Time
- Notice Register and Time Bar Tracking — Protecting Entitlements on Both Sides
- Contractor Performance Indicators and Progress Reports — Early Warning of Slippage
- Payment Certification and Price Adjustment Formulae — Accurate Interim Valuations
- Punch Lists, Defects Liability and Final Account — Clean Release of Retention

Day 5: Practising the Phase-by-Phase Contract Risk and Control Map

- Tender Evaluation for a Sample Substation Package — Applying Pre-Award Methods
- Mobilisation Review for a Solar and Storage Contract — Applying Award Controls
- Variation and Delay Scenario on a Transmission Line — Applying Administration Procedures
- Close-Out Readiness Review — Linking Punch Lists to Final Account
- Phase-by-Phase Contract Risk and Control Map — Completed Project Contract Plan

Applying Energy Contract Management Phases After the Course

- Set up a notice register and variation log for one live power or energy contract.
- Run a pre-award review of the next tender package against the evaluation matrix taught.

Energy Contract Management Phases Questions FAQ

What are Energy Contract Management Phases and why do they matter now?

Energy Contract Management Phases are the pre-award, award and post-award stages through which a power or energy contract is planned, signed and administered. They matter now because more packages are tendered at once and supply delays make variations and claims common.

Which roles gain most from Energy Contract Management Phases?

Contract managers, project engineers and commercial staff gain most, along with project controllers. You gain most when tendering, engineering and commercial colleagues attend together.

How do Energy Contract Management Phases differ from contract negotiation and claims training?

They cover the whole contract sequence rather than one activity. A negotiation and claims course focuses on bargaining and dispute positions; this course follows each phase from scope drafting to final account and sets controls for every stage.

What do you bring back from Energy Contract Management Phases?

You bring back a map of risks and controls for each contract phase of a power or energy project. You also bring back an evaluation matrix and a mobilisation checklist.

Energy Contract Management Phases: The Way Forward

The phase-by-phase contract risk and control map shows which risks sit in each stage and which control owns them. Its first use is the award recommendation for the next package, and contract managers, engineers and commercial staff share it. After first use, revisit how well pre-award controls actually prevented variations.