

Committee on Standardization of Oilfield Equipment & Materials (CSOEM)

New Member Orientation

Ivan Pinto

Upstream Standards

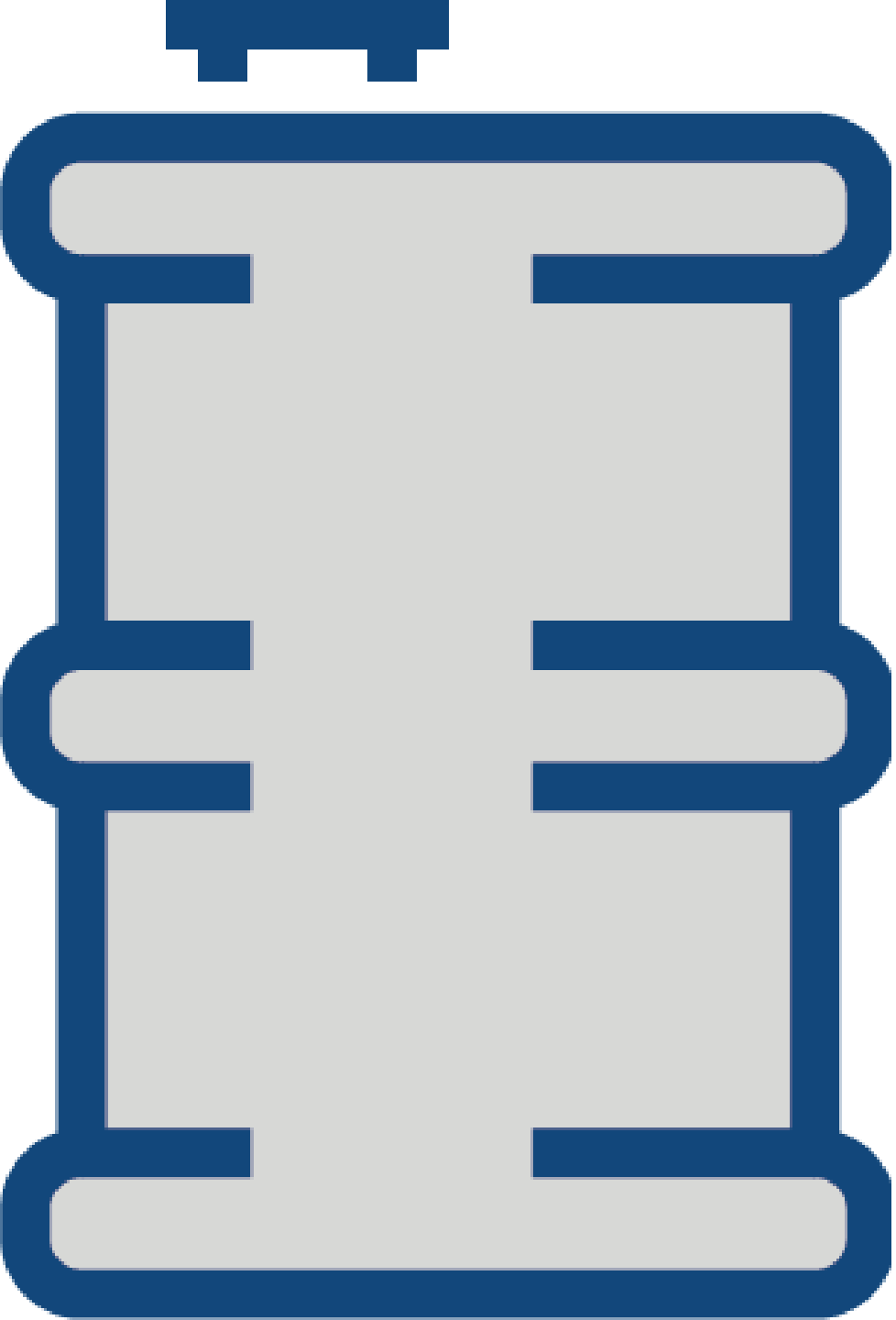
January 2023



Today's Presentation

- API Background
- Standard Committees – Structure and Governing Documents
- Standards Development Process
 - Types of Standards
 - Process flow
 - Leadership responsibility
- Resources
 - Antitrust Guidelines
 - Standards Plan
 - myCommittees

API Organization and Background



API Background

- API formed in 1919 as national trade association to support the U.S. oil and natural gas industry through legislative and regulatory advocacy and standards development
- The API Standards Department was formed in 1923, and the first API standard was published in 1924
- All industry segments are now active in standardization – Refining, Marketing, Exploration & Production, Petroleum Measurement, and Pipeline & Rail Transportation

API Functions

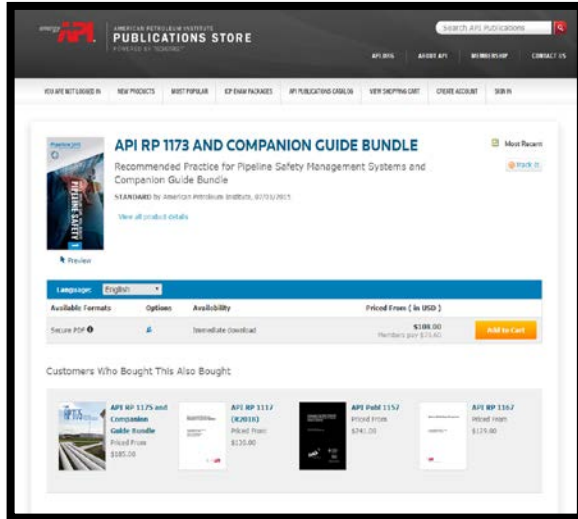
- Government advocacy
- Inform government and public

- **Develop standards**
- Gather statistics
- Conduct research
- Administer quality, certification and safety programs

- 100+ Employees
- 700+ Standards
- 56,000 Personnel Certifications in 128 Countries
- 200 Training Programs
- 50,000+ Licensed Products
- 4000+ Company Certifications in over 80 Countries
- 145 Auditors

API Standards

API Standards promote safety, environmental protection, reliability, and sustainability through proven engineering practices



Cover all industry segments

- **Upstream** (Exploration & Production)
- **Downstream** (Refining & Marketing)
- **Midstream** (Pipeline, Rail & Truck transportation, and Petroleum Measurement)



American National Standards Institute (ANSI) accredited standards developing organization



API now publishes **+700** standards



Over **650** citations in U.S. Code of Federal Regulations



Value of API Standards

- Improve safety and reliability
- Improve equipment interchangeability
- Reduce compliance costs
- Reduce procurement costs
- Foundation of company standards
- Foundation of API quality and certification programs

Value of Participation

- Gives your company a voice in the development of a standard
- Networking with experts from other companies to learn from their experiences
- Sharing lessons learned to prevent problems before they occur
- Early access to information
- Use knowledge to help demonstrate compliance with industry standards to customers and regulators
- Opportunity for company personnel to gain expertise through consistent participation

API Standards Committees

Structure and Governing Documents

Committee Governance

The Standards Committees report to the relevant API Segment Committees for policy guidance and SME resourcing

CSOEM – Upstream Committee

CRE – Refining Committee

COPM & COPS – Pipeline Committee

Procedure for Standards Development, 6th Edition. ANSI approved July 2019



Governs the development of standards published by API.
All API standards development activities are conducted in accordance with this procedure

API S1: Organization and Procedures for the CSOEM, 24th Edition, June 2017



Policies and procedures for the CSOEM, its activities, and guidelines for its conduct.

API Upstream (CSOEM) Standards Program

Committee on Standardization of Oilfield Equipment and Materials (CSOEM)

- ✓ Supervises work of 15 subordinate committees
- ✓ Coordinates cross-committee issues
- ✓ Approves standards research

Offshore
Structures
(SC2)

Tubular
Goods
(SC5)

Valves and
Wellhead
Equipment
(SC6)

Drilling
Structures and
Equipment
(SC8)

Well
Cements
(SC10)

Field Operating
Equipment
(SC11)

Drilling, Completion,
and Fracturing Fluids
(SC13)

Fiberglass
and Plastic
Tubulars
(SC15)

Drilling Well
Control
Systems
(SC16)

Subsea
Production
Equipment
(SC17)

Quality
(SC18)

Completion
Equipment
(SC19)

Supply Chain
Management
(SC20)

Materials
(SC21)

Offshore
Crane and
Safe Lifting
(SC22)

Subcommittee Responsibilities

Chair

- Reports to the CSOEM
- Guides the activities of the subcommittee and leads meetings
- Appoints the chairs of subordinate groups established within the subcommittee
- Approves requests for voting rights in consultation with API staff
- Establishes the time, date, and agenda for subcommittee meetings and submits the agenda to staff for distribution
- Leads the group in achieving consensus on SC issues, including expression of provisions and comment resolution

Vice-chair

- Assists chair with SC management and planning
- Presides over SC meetings in the absence of the chair

Secretary

- Documents action items and decisions for the meeting minutes
- Ensures record of meeting attendance is completed and provided to API staff

Subordinate group chair

- Sets meeting dates and locations
- Guides the activities of the group and leads meetings
- Leads the group in achieving consensus
- Reports to the subcommittee on the status of the project

Types of API Documents

Specifications

Documents that are written in such a way as to facilitate communication between purchasers, manufacturers, and/or service providers.

Standards

Documents that combine elements of both specifications and recommended practices.

Recommended Practices (RP)

Documents that communicate recognized industry practices. RPs may include both mandatory and non-mandatory requirements.

Technical Reports (TR)

Documents that convey technical information on a specific subject or topic and are generally issued on a one time-basis.

Expressions of Provision

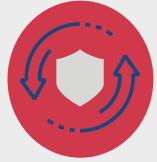
Only these terms shall be used!

- Shall – indicates that a provision is mandatory
- Should – indicates that a provision is not mandatory, but recommended as good practice
- May – denotes a course of action permissible within the limits of a standard
- Can – used for statements of possibility or capability

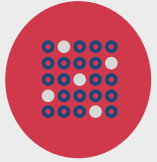
NOTE: The word “must” is only used to express regulatory requirements.

API Standards Development Process

API Standards Development Process



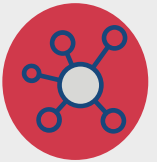
Transparent, impartial, and consensus-based process



Driven by research, data, and science-based decisions



Committees comprise of thousands of volunteers from industry, academia, government, and NGO's



Collaborate with other standards bodies to avoid duplication; connect globally



Incorporate proven engineering practices, updated periodically

API Consensus

- Consensus is established when substantial agreement has been reached by directly and materially affected interests.
- Substantial agreement means more than a simple majority but not necessarily unanimity.
- Consensus requires that all views and objections be considered, and that a reasonable effort be made toward their resolution.
- API's criteria for achieving consensus are defined as a majority of those eligible to vote shall have voted *and* approval by at least two-thirds of those voting, excluding abstentions.

Balanced Representation

API seeks broad input to its standardization activities including the participation of all parties representing interest categories appropriate to the nature of the standard and allows for open attendance at standards meetings.

API strives for balanced representation from each interest category (for example, operator-user, manufacturer-service supplier, and general interest).



Granting Voting Rights

The following are considerations when granting voting rights

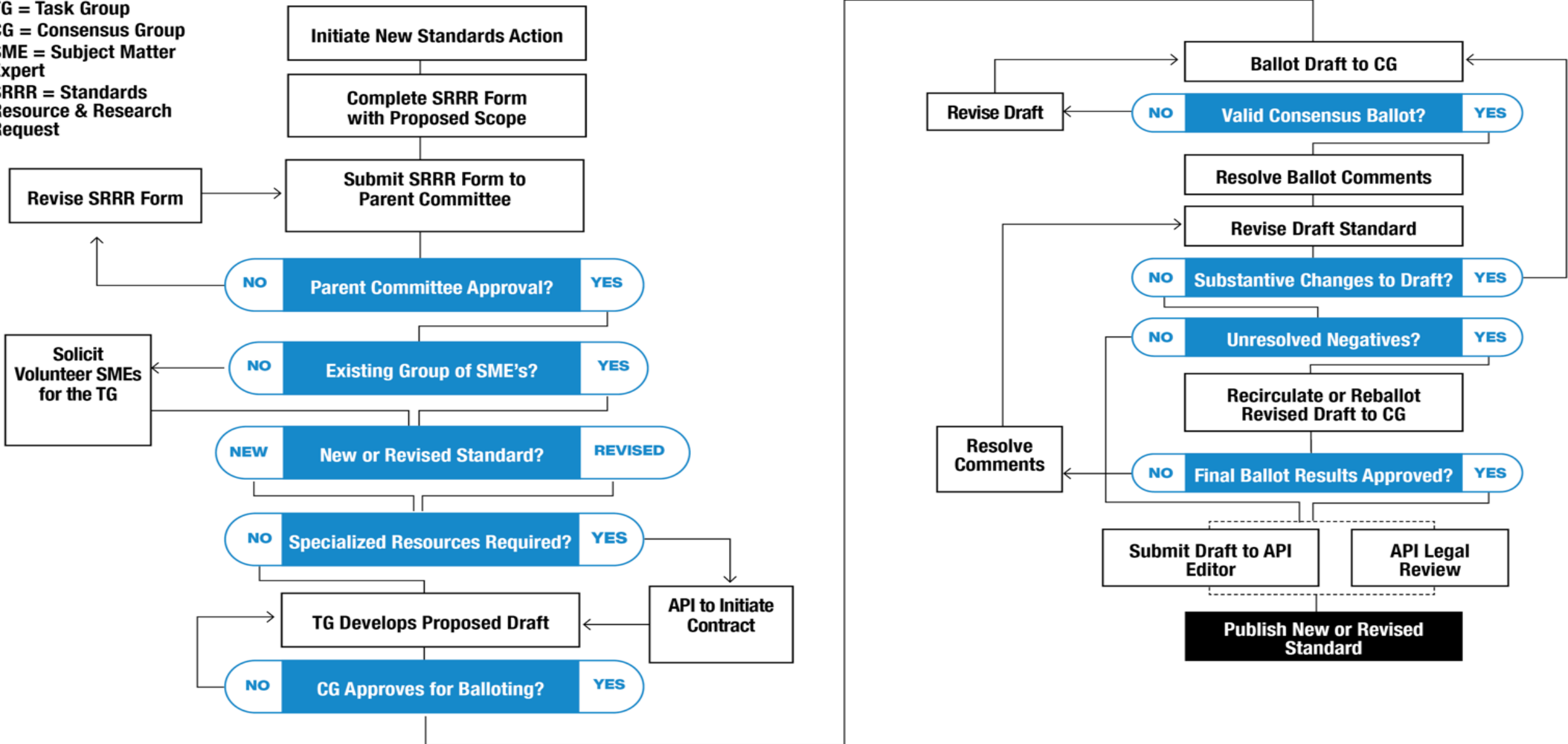
- Technical Competence
- Management Support
- Regular attendance and participation at subcommittee meetings
- Regular participation on subordinate groups working under a given subcommittee
- Ongoing vote participation (regularly missing votes can result in loss of voting privileges)

All interested parties (voting and non-voting) can participate in the standards development process.

API Standards Development Process

KEY:

TG = Task Group
 CG = Consensus Group
 SME = Subject Matter Expert
 SRRR = Standards Resource & Research Request



Standard draft development

- Upon approval of the SRRR by the relevant subcommittee and SCOEM, the task group chair initiates all activities relevant with the new standard action.
- Task group chair solicits volunteer SME's for the consensus group ensuring the balance between the operators-users, manufacturers and general interest.
- Task group, with the API editorial support, develops and approves a draft for balloting.

Balloting

- Balloting is conducted using API's electronic balloting system <https://ballots-prod.api.org/Login>
- Ballots are generally set for six weeks. Ballots are distributed to members of the relevant committee or consensus body
- Information on accessing copies of ballot drafts and submitting comments is distributed to those who have expressed an interest in participating in the ballot
- Only one vote is allowed for each voting company

Ballot approval

- For a proposed ballot action to be considered approved, all comments shall be considered, and both of the following conditions shall be satisfied:
 - a) the majority of the members who are eligible to vote shall have voted; and
 - b) at least two-thirds of the combined valid affirmative and valid negative votes (excluding abstentions) shall be affirmative.

Dispositioning ballot comments

- All comments must be considered regardless of the source.
- Comment resolution must be done in an open meeting(s).
- The following format should be used to document resolution
 - Accepted – text is modified as the commenter suggested
 - Accepted in principle – commenter’s premise is accepted however the modified text is different
 - Not accepted – no changes made
 - Noted – Comment has been considered but no change will be made at this time
- All commenters shall be advised of the disposition comments

Recirculation

- All ballot comments and changes made in a proposed API standard are reported to the consensus body in order to afford all members the opportunity to respond, reaffirm, or change their vote.
- Recirculation is generally done by email with a 15 days review period

Optional Reballot

- In some cases, reballot of the entire or partial document may be required due to the substantive changes made to the draft document during the comment resolution.
 - When the decision is to reballot an entire document, the results of that ballot shall supersede the previous ballot.
 - When the decision is to reballot a portion of the document, it should be clearly explained which portions of the proposed standard are being reballot.

Additional Information and Resources

API Antitrust Guidelines

It is API's policy to comply with the antitrust laws. API staff and member company representatives should observe the following guidance:

- No discussion or forecasting of prices for goods or services provided by or received by a company.
- No sharing or discussing any company's confidential or proprietary information.
- No discussion of an company's specific purchasing plans; merger/divestment plans, production information, inventories or costs.
- No sharing or discussion of specific company compliance cost, unless publicly available.
- No agreement or discussion regarding the purchase or sale of goods or services (such decisions are independent company decisions).
- No discussion of how individual companies intend to respond to potential market/economic scenarios or government action; discussion limited to generalities.
- No disparaging remarks regarding specific vendors, products or services.

If a discussion presents an antitrust issue, raise your concern immediately. If the discussion continues, announce that you are leaving the meeting because you have an antitrust concern, and immediately report your concern to API's Office of the General Counsel and to your company's own counsel.



API Standards Plan

- API's Standards Development plan is posted and updated in real time. <https://www.api.org/products-and-services/standards/standards-plan>

- Overview
- Standards News and Announcements
- Purchase
- Requests for Interpretation
- Global Standards
- Get Involved
- Standards Plan
- Committees
- Copyright / IBR Reading Room

Standards Plan

Below is a list of standards in development by industry segment.
See a breakdown of standards in pre-ballot, ballot, and editing: [Chart Standards](#)

Downstream
Midstream
Upstream
Published (2022)

COPY
PRINT
SHOW 10 ROWS

Search:

Committee	Pub. Type	Pub. No	Title	Ed.	Pre-Ballot Phase	Ballot Phase	In Editing
CSOEM	RP	17A	Design and Operation of Subsea Production Systems - General Requirements and Recommendations	6		X	
CSOEM	RP	17B	Recommended Practice for Flexible Pipe	6	X		
CSOEM	Spec	17D-A1	Specification for Subsea Wellhead and Tree Equipment	3	X		
CSOEM	Spec	17D-A2	Specification for Subsea Wellhead and Tree Equipment	3	X		
CSOEM	Spec	17E	Specification for Subsea Umbilicals	6	X		
CSOEM	Std	17F	Standard for Subsea Production Control Systems	5	X		
CSOEM	Std	17G1	System Configuration and Operation of Subsea Well Intervention Systems	1		X	
CSOEM	RP	17G2	Recommended Practice for Subsea	1	X		



myCommittees



American Petroleum Institute
MyCommittees

[MyCommittees](#)

[My Rosters](#)

MyCommittees

- MyCommittees
 - API-U
 - Center for Offshore Safety
 - Certification
 - Corporate Affairs
 - Downstream
 - Government Affairs
 - Lubricants
 - Marine
 - Midstream
 - RASA
 - Standards
 - Statistics
 - Taxation
 - Upstream

API Contact

API
200 Massachusetts Ave NW
Washington, DC 20001
202-682-8000

Welcome to the API MyCommittees Web Site!

- **First-time visitor to the MyCommittees site (New members) :**
 - The system generates a random password for your account upon your addition to a committee. As a first-time user, you would use the Forgot Password feature to reset the system generated password and sign into the site.
 - For step-by-step instructions, please refer to the [Login Instructions](#).
- **Sign In:**
 - If you see "Sign In" at the top right-hand corner of the screen, you are not signed into the site.
 - If you have successfully signed into the site, you should see "[your e-mail address]" at the top right-hand corner of the screen.
- **Accessing Sites:**
 - After signing in, to get to the desired site, you may have to click on the plus (+) button next to a link in the left navigation area to expand the list of available sites.
 - If the site link does not appear on the left navigation, please contact your API liaison as you may need committee membership to gain access.
- **Forgot Password:**
 - If you have forgotten your password, on the top right-hand corner of the screen click on "Sign In". On the sign in screen, you will find the "Forgot your password?" link.
 - For step-by-step instructions, please refer to the [Login Instructions](#).

Sites of Interest

- [API Website](#)
- [Energy from Shale](#)
- [Energy Nation](#)
- [Oil & Gas Workforce](#)
- [Oil Spill Prevention](#)



American
Petroleum
Institute

API Information Links

- Committee SharePoint Sites – <https://mycommittees.api.org/standards/cre/default.aspx>
- Ballot System – <https://ballots-prod.api.org/Login>
- Requests for Interpretations of Standards (RFI's) – <https://www.api.org/products-and-services/standards/standards-inquiries>
- Meeting Information – <https://events.api.org/#upcoming-events>
- Catalog of Publications – <https://www.api.org/products-and-services/standards/purchase>
- Standards Plan – <https://www.api.org/products-and-services/standards/standards-plan>

Reference Documents

- ❖ [API Procedures for Standards Development](#)
- ❖ [API S1 CSOEM Policy Document](#)
- ❖ [API Document Format and Style Manual](#)

NOTE: These documents can be found on the various committee SharePoint sites under the “Forms and Reference Documents” tab

API Standards Contact Information

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- **Jacqi Roueche**, Senior Program Manager, rouechej@api.org (202) 682-8286;
SC 8, SC 16, CCS
- **Katie Burkle**, Senior Program Manager, burklek@api.org (202) 682-8507;
SC 11, SC 18, SC 20, SC 21
- **Ben Coco**, Senior Program Manager, cocob@api.org (202) 682-8056;
SC 2, SC 5, SC22, Std 1104, Drilling & Production Operations SC
- **Jeff Atteberry**, Program Manager, atteberryj@api.org (202) 682-8212;
SC 10, SC 13, SC19
- **Lanaya Bankins**, Program Assistant, bankinsl@api.org (202) 682-8565;
ballot system, rosters updates, SharePoint sites

Thank you!