BEIREK

SERVICE PROGRAM

Project Discovery & Site Assessment

Project Reality, Site Conditions and Delivery Risk Assurance Before Commitment

BEIREK LLC - THE PROJECT MANAGEMENT COMPANY

An independent project management service that reconciles the project described in documents and stakeholder discussions with the conditions observed on site. The program identifies what is verified, what remains uncertain and what must change before an investment, engineering, procurement and construction (EPC), engineering, procurement and construction management (EPCM), project management consultancy (PMC), operations and maintenance (O&M), or other long-term delivery commitment is made.

> A site visit creates value only when it changes a decision. Its purpose is to establish whether the project can be responsibly scoped and priced now, whether specified uncertainties must first be closed, or whether the opportunity should be held, reshaped or stopped.

PREPARED BY
BEIREK LLC
THE PROJECT MANAGEMENT COMPANY

SERVICE PROGRAM
PROJECT DISCOVERY & SITE ASSESSMENT
US ENGLISH · VERSION 3.4-FINAL

PROGRAM FRAMEWORK

1. The service converts a proposed visit into a controlled pre-commitment decision

A project may appear coherent during an introductory call while its governing evidence remains incomplete. Documents can describe an asset that no longer matches the facility. Different stakeholders may use the same project name for different scopes. Equipment condition, access, utilities, operating constraints, permits, maintenance history, commercial expectations and delivery responsibilities may be partly known, assumed or disputed. If these conditions are carried directly into a quotation or contract, uncertainty is silently converted into price, schedule and performance exposure.

Project Discovery & Site Assessment is designed to prevent that conversion. BEIREK first defines the decision that the assessment must support, the information that should exist before travel, the people who must be available, the physical areas and interfaces that can be inspected, and the limitations of an observational review. The site program then tests the stated project against accessible evidence. Findings are classified by materiality and translated into a decision note, data-closure actions, responsibility boundaries and options for the next engagement.

The service is not a free sales visit. It involves senior management attention, technical preparation, counterparty and authority verification, travel planning, fieldwork, interviews, evidence control, analysis and a formal readout. The professional fee, travel budget and third-party expenses are agreed before mobilization. An introductory meeting or a limited document check may remain part of commercial pre-qualification; client-specific investigation and advice begin only under an accepted service scope.

The intended result is a traceable basis for one of five management decisions: proceed to a defined next phase; proceed subject to explicit conditions; rescope the opportunity; commission further specialist investigation; or stop. This service does not guarantee that the project is feasible, financeable or contractable. It makes the quality of the available evidence, the remaining uncertainty and the consequences of commitment visible to the authorized decision-makers.

PROGRAM FRAMEWORK

1. The service converts a proposed visit into a controlled pre-commitment decision

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1.1 The engagement is suitable only when the assessment can influence a real decision

The service is suitable for an owner, investor, developer, lender-side or owner-side team, industrial company, infrastructure sponsor, operating company or prospective delivery partner that is considering a material commitment and can provide a defined decision owner. Typical triggers include a request for a fixed price before the scope is mature; an invitation to assume EPCM, PMC, commissioning or O&M responsibility; a facility with incomplete technical records; conflicting narratives about asset condition; a proposed acquisition or rehabilitation that requires an operational reality check; or a remote opportunity for which travel, access and counterparty risk must be governed.

It is not suitable where the visit has no defined decision purpose, the inviting party cannot demonstrate its relationship to the facility, access is informal, critical personnel will not participate, basic documents are deliberately withheld, travel and security requirements cannot be cleared, or BEIREK is expected to issue a fixed-price engineering or performance commitment from observation alone. The program may also be held if specialist measurements or legal permissions are prerequisites to a responsible visit.

Before accepting the assignment, BEIREK and the client state the decision question in one sentence. Examples include whether the current information is sufficient to price a feasibility or EPCM phase; which investigations are required before a rehabilitation scope can be frozen; whether an O&M transition is institutionally and technically ready; or which facility and infrastructure constraints must be reflected in the next procurement. If no concrete decision will change, the assessment is not yet properly defined.

PROGRAM FRAMEWORK

1. The service converts a proposed visit into a controlled pre-commitment decision

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Acceptance at this stage requires a named client sponsor, an authorized BEIREK engagement lead, a preliminary description of the facility and project, a declared intended next phase, known access and security conditions, and an initial list of documents and stakeholders. These inputs do not prove the project; they establish whether a disciplined discovery process can begin.

PROGRAM FRAMEWORK

2. The assessment separates commercial introduction, professional investigation and delivery commitment

Confusion between these three stages creates avoidable risk. A commercial introduction establishes who the parties are, why contact has been made and whether a potential fit exists. It may include a short online meeting and a high-level review of a limited information set. It does not include a client-specific field investigation, technical conclusion or reliance-ready scope recommendation.

A professional assessment begins when BEIREK is asked to prepare for the site, organize experts, review project materials, travel, inspect accessible conditions, interview stakeholders, record findings and advise on a next decision. The effort and responsibility exist even when the eventual decision is not to proceed. The assessment is therefore contracted, budgeted and governed as a paid service rather than treated as a cost of sales.

A delivery commitment is a separate decision. Fixed price, definitive schedule, staffing promise, performance responsibility, operating responsibility or long-term contractual risk should reflect a verified scope, known interfaces, an agreed information basis and stated assumptions. Completion of the assessment may support such a proposal, but it does not automatically create one. Any subsequent feasibility, Pre-FEED, EPCM, PMC, commissioning or O&M engagement has its own scope, commercial terms, acceptance criteria and authority.

This boundary protects both parties. The client receives a clear evidence package even if no larger engagement follows. BEIREK avoids building an unconditional proposal on information it could not verify. Third parties can see which conclusions arose from documents, interviews, direct observation or specialist work. Open assumptions do not disappear inside a price; they remain visible as decisions, conditions or separately scoped investigations.

PROGRAM FRAMEWORK

2. The assessment separates commercial introduction, professional investigation and delivery commitment

CONTINUED · 02

The boundary is accepted when the engagement letter distinguishes introductory activity, assessment work and any later delivery service; identifies reimbursable expenses; states the limits of observation; and names the decision output. Language suggesting that travel itself constitutes technical approval, due diligence or acceptance is removed.

PROGRAM FRAMEWORK

3. Three connected phases move from stated project to verified decision basis

The program has three principal phases: Desktop Discovery, On-site Verification and Decision Readout. Their sequence is deliberate. Travel without preparation produces impressions rather than evidence. Desktop review without field verification can preserve false assumptions. Field notes without a structured readout do not control the next investment or contract decision.

3.1 Phase 1 — Desktop Discovery defines the test before the team travels

Desktop Discovery establishes what the project is understood to be, what the client wants to decide and what evidence should be available. BEIREK inventories the data room and other provided materials rather than assuming that file volume equals information quality. Documents are indexed by source, date, version, subject, owner and intended use. Conflicts, missing dates, superseded versions and unverified statements are recorded.

The project narrative is decomposed into testable elements: facility identity and location; ownership or operating relationship; intended asset or service boundary; current operating state; target change; equipment and infrastructure involved; expected delivery model; known permits and authority interfaces; proposed schedule; budget or pricing expectation; and claimed readiness. Each element is linked to available evidence or marked as an assumption.

BEIREK prepares an open-question and assumption log, stakeholder and authority map, interview plan, site agenda and inspection checklist. The agenda prioritizes areas that could change scope, responsibility, cost, schedule or mobilization. It also identifies restrictions: areas that cannot be entered, equipment that cannot be stopped, records that cannot be disclosed, personnel who are unavailable, and measurements that cannot be made.

PROGRAM FRAMEWORK

3. Three connected phases move from stated project to verified decision basis

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Travel planning is part of project governance. The phase checks the host entity, signatory authority, relationship to the site, invitation and access protocol, visa and insurance needs, transport, accommodation, communications, health and safety requirements, local security, emergency arrangements, prohibited activities and information-security expectations. BEIREK retains an independent decision on whether its team can travel and work safely.

The phase output is a Desktop Discovery Pack containing the project hypothesis, decision question, document inventory, gap and assumption log, stakeholder map, planned interview list, inspection checklist, visit program, evidence-capture rules and mobilization conditions. Acceptance requires that the visit has a clear purpose, accessible scope, realistic agenda, authorized host and cleared commercial, travel and security basis.

3.2 Phase 2 — On-site Verification tests observable reality and critical interfaces

On-site Verification compares the stated project with conditions that can be observed or supported by records and interviews. It is not an unstructured walkthrough. The team opens with a site briefing that confirms authority, safety rules, restricted areas, operating conditions, permitted evidence capture, interview availability and any change to the agreed agenda. Deviations are recorded because a materially reduced inspection scope changes the confidence of the eventual conclusions.

The physical review considers facility condition, access, layout, equipment identity, apparent state, capacity indicators, utilities, infrastructure, material and people flows, maintenance access, storage, logistics, security and critical interfaces relevant to the stated project. The exact checklist depends on the sector and assignment. Observation distinguishes between what was directly seen, what was demonstrated, what was stated by a stakeholder and what was supported by a controlled record.

PROGRAM FRAMEWORK

3. Three connected phases move from stated project to verified decision basis

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Equipment and operating discussions may address original equipment manufacturer (OEM) information, manuals, nameplates, configuration, operating history, alarms, failures, maintenance strategy, spare parts, warranty status, modification history, testing, commissioning and existing service arrangements. BEIREK does not infer internal condition or remaining life from appearance alone. Where a conclusion requires inspection instruments, sampling, dismantling, certified survey, laboratory analysis or engineering calculation, the item is transferred to a specialist-work recommendation.

The review also tests delivery reality: who has decision authority; which team operates and maintains the facility; what work can occur during live operations; which permits or shutdowns may be required; how contractors and materials enter; what local skills, tools and services are available; which interfaces depend on the employer, OEM, utility, landlord, authority or other third party; and how schedule or performance expectations interact with actual constraints.

Interviews are structured around roles and evidence. Statements are not treated as verified merely because several participants repeat them. Conflicting accounts are captured without forcing premature consensus. Sensitive issues are escalated through the agreed communication route. Photographs, where authorized, are indexed by date, location, subject and finding reference; they supplement rather than replace notes and records.

The daily closeout reconciles observations, interviews, received documents, unanswered questions, restricted items and emerging critical findings. Immediate safety or integrity concerns are communicated through the authorized site route; BEIREK does not assume the site's statutory or operational control. The phase is accepted when the agreed accessible scope has been covered, evidence has been indexed, material deviations have been disclosed and unresolved points are clearly distinguished from verified findings.

PROGRAM FRAMEWORK

3. Three connected phases move from stated project to verified decision basis

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3.3 Phase 3 — Decision Readout converts findings into scope and action

The Decision Readout organizes evidence by decision impact rather than by the order in which the team encountered it. Each finding states the condition, source, confidence, affected scope or interface, potential cost/schedule/performance implication, owner, required action and required decision date. An observation that does not affect a decision is not elevated into a red flag merely to make the report look substantial.

Findings are grouped into critical constraints, material risks, manageable conditions, information gaps and confirmed strengths. “Critical” indicates that commitment should not proceed on the current basis until a specified matter is resolved or explicitly accepted by the authorized party. It does not imply that BEIREK has issued a legal, engineering or financial opinion. Confidence is stated according to the evidence available: verified from controlled source; corroborated by multiple sources; observed but not independently tested; reported but not verified; or not assessed.

BEIREK then defines scope options for the next stage. A minimum option closes only the evidence needed for a specified decision. A recommended option creates a more reliable technical, commercial and delivery basis. An extended option may integrate additional project management or specialist work where the client requires broader assurance. Options show dependencies, client inputs, third-party needs, exclusions and decision gates; they are not presented as interchangeable packages when they produce different levels of certainty.

PROGRAM FRAMEWORK

3. Three connected phases move from stated project to verified decision basis

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The readout includes a management discussion with the authorized client team. Comments can correct factual errors or supply new evidence, but they do not remove an inconvenient finding without a traceable basis. The final decision note records agreed corrections, unresolved differences and the decision owner's direction. Acceptance requires every material conclusion to link to evidence or an explicit limitation and every recommended action to have an owner and purpose.

PROGRAM FRAMEWORK

4. Technical, commercial and delivery lenses must agree before the project can be called executable

Technical feasibility alone does not establish a deliverable project. The assessment therefore applies three connected lenses. Each lens asks different questions, but findings are reconciled because the most material risk often sits at their interface.

4.1 Technical lens

The technical lens examines the accessible condition and configuration of facilities, equipment and utilities relevant to the proposed work. It considers whether available drawings, lists, manuals, records and nameplates correspond with the observed asset; whether capacity and operating claims have an identifiable basis; whether maintenance, failure, testing and commissioning records exist; and whether apparent access, integrity, quality or obsolescence issues may affect the next scope.

The lens also identifies specialist information required to move beyond observation. Topographic, geotechnical, structural, environmental, electrical, mechanical, process, fire, metering, energy-yield or other professional assessments are not simulated inside the visit. BEIREK specifies the decision that each further investigation must support, the required source conditions and how the result should enter scope, estimate, schedule or acceptance.

4.2 Commercial lens

The commercial lens tests whether the employer's stated objective, scope expectation and responsibility model are sufficiently coherent for the next commitment. It maps assumed inclusions and exclusions, owner-supplied information and facilities, third-party dependencies, procurement interfaces, operating restrictions, price and payment expectations, reimbursable costs, possible change drivers and contract assumptions.

PROGRAM FRAMEWORK

4. Technical, commercial and delivery lenses must agree before the project can be called executable

CONTINUED · 02

The purpose is not to negotiate a final contract during the visit. It is to identify where a technical observation changes commercial exposure. Limited access can require a contingency or further survey. Unverified equipment identity can prevent a fixed replacement scope. An unavailable shutdown can change methods and schedule. An unclear employer/OEM boundary can create duplicated or missing responsibility. These relationships are stated so that a later commercial proposal has a defensible basis.

4.3 Delivery lens

The delivery lens examines whether the project can be mobilized and governed under actual site conditions. It considers authority, permits, stakeholder alignment, workforce and operating capability, logistics, transport and storage, security, health and safety, workfront access, shutdown requirements, utilities, local suppliers, communication, document control, decision speed and schedule dependencies.

The lens distinguishes “possible in principle” from “ready to execute.” A technically reasonable intervention may remain undeliverable until access rights, operating windows, permits, specialist resources, employer decisions or temporary facilities are secured. Conversely, an operationally mature site may reduce uncertainty even when some technical studies remain open. The readout preserves both facts rather than collapsing them into a single score.

Acceptance across the three lenses requires each material finding to identify its primary and connected impacts. No positive technical observation is used to cancel an unresolved commercial or delivery constraint, and no commercial urgency is used to bypass a necessary technical verification.

PROGRAM FRAMEWORK

5. Six decision gates prevent travel and commitment from advancing on informal authority

The program uses six decision gates from initial opportunity to the formal decision note. Gates are not administrative signatures. Each gate confirms that a defined risk has an adequate evidence basis and an authorized owner. The outcome may be pass, conditional pass, hold or stop.

Gate	Decision purpose	Minimum evidence	Principal output
D0 — Opportunity Intake	Confirm the opportunity and the decision the service must support	Project claim, proposed site, inviting party, intended next engagement and preliminary urgency	Opportunity record and decision question
D1 — Counterparty & Authority Check	Confirm who is asking BEIREK to act and its relationship to the facility	Corporate identity, signatory or sponsor authority, site relationship, relevant contact chain	Counterparty and mandate verification record
D2 — Desktop Readiness	Determine whether preparation is sufficient for a useful visit	Minimum documents, open-question log, available personnel, accessible areas and inspection agenda	Desktop Discovery Pack and readiness decision
D3 — Commercial & Travel Clearance	Authorize expenditure and safe mobilization	Accepted service terms, professional fee, travel budget, itinerary, visa/insurance, security and site protocol	Written mobilization clearance
D4 — Site Assessment	Confirm that the agreed field scope and evidence capture were completed	Opening briefing, accessible inspection record, interviews, photographs where authorized, received records and deviation log	Controlled field evidence set
D5 — Decision Note	Decide the next path and its conditions	Classified findings, data gaps, scope boundaries, action owners, specialist needs and options	Approved decision note and engagement roadmap

D0 prevents enthusiasm from substituting for a project definition. The opportunity record describes what is claimed, why the assessment is being considered and which decision would follow. If the opportunity is too vague to state a decision, it remains in commercial qualification.

PROGRAM FRAMEWORK

5. Six decision gates prevent travel and commitment from advancing on informal authority

CONTINUED · 02

D1 protects against mobilization based on a verbal invitation or an intermediary whose mandate is unclear. Verification is proportionate to the engagement and jurisdiction, but it must establish the corporate entity, relevant decision-maker, connection to the facility and authority to arrange access. BEIREK does not treat logos, email domains or informal introductions as complete authority evidence.

D2 tests whether the visit can close meaningful uncertainty. Missing documents do not always stop a visit; discovering absent records may itself be part of the assignment. The gate does, however, distinguish a known evidence gap from an unprepared engagement. It records which questions can be addressed observationally, which require records and which require separate specialist work.

D3 links commercial acceptance with travel suitability. No management or technical personnel are deployed until the professional scope, agreed expenses, site access, transport, accommodation, insurance, health and safety, security and communication arrangements are adequately resolved. Reservations and third-party payments may require advance funding. BEIREK can hold or cancel travel if conditions change materially.

D4 confirms what actually occurred on site. If areas, people, records or operating states differ from the agreed plan, the limitation is not hidden. The team decides whether alternative evidence is sufficient, a follow-up is necessary or the conclusion must remain qualified.

D5 closes the assessment as a management product. It records the recommendation, the evidence and limitations, conditions for proceeding, actions and owners, unresolved differences, proposed next scope and decision authority. A long-term contract discussion does not replace this gate.

PROGRAM FRAMEWORK

6. Responsibilities are allocated before mobilization and maintained through the readout

The client or employer provides accurate available information, names the sponsor and decision-makers, explains its legal and operational relationship to the site, secures authorized access, makes relevant personnel available, discloses restrictions, provides site rules and known hazards, and reviews factual findings. It arranges safe reception and site logistics as agreed and either books approved travel directly or funds agreed reimbursable expenses. The client remains responsible for its investment, procurement and contracting decisions.

BEIREK defines the assessment method, challenges the project narrative, manages the document and question inventory, determines the required team, establishes the visit agenda, assesses whether travel is suitable, conducts the observational review, structures interviews, controls the finding record, classifies uncertainty and prepares the decision note and next-scope options. BEIREK may decline an instruction, area or activity that is unsafe, unauthorized or outside the agreed professional boundary.

The host facility retains operational control, statutory duties, permit-to-work processes, isolations, emergency response and authority over its personnel and equipment unless a different lawful arrangement is expressly documented. Contractors, OEMs and suppliers remain responsible for their statements, products, methods, records and contractual duties. Qualified engineers, surveyors, laboratories, environmental and social specialists, security advisers, lawyers, tax advisers, accountants, insurers and finance professionals own their respective work and opinions.

Responsibility is recorded by activity rather than title alone. For each material action, the program identifies who supplies the input, who recommends, who decides, who performs, who verifies and who accepts. The same person may hold more than one role when appropriate, but the record makes the combination visible. Silence is not treated as acceptance.

PROGRAM FRAMEWORK

6. Responsibilities are allocated before mobilization and maintained through the readout

CONTINUED · 02

Escalation routes are agreed for immediate safety concerns, suspected misrepresentation, access refusal, material evidence conflict, security change, scope change and a requested conclusion that the evidence cannot support. Acceptance requires all critical responsibilities and escalation routes to have named authorized owners before travel, with changes captured during the engagement.

PROGRAM FRAMEWORK

7. Eight core deliverables create a reusable evidence package rather than a travel summary

The deliverable set is tailored to the decision, but the source service defines eight core outputs. They are designed to work together; the executive note without its evidence registers would be too easy to misread, while raw field material without a decision note would be difficult to use.

01

7.1 Executive Assessment Note

The note states the decision question, scope and date of the review, accessible and restricted areas, critical conclusion, recommended management decision, key conditions, material limitations and immediate actions. It distinguishes verified facts, observations, stakeholder statements and open assumptions. Acceptance requires that an authorized reader can understand what should happen next and why without interpreting the raw field notes.

02

7.2 Site Reality Baseline

The baseline records the verified view of the facility, relevant equipment, infrastructure, utilities, operations, people and access conditions at the assessment date. It references source documents, observations and interviews and marks information that could not be tested. It is a controlled starting point for subsequent scope; it is not an asset certificate, valuation or remaining-life opinion.

03

7.3 Critical Findings Register

Each finding has a unique identity, condition statement, evidence reference, classification, confidence level, affected scope and interfaces, potential implication, owner, target decision and closure evidence. Urgency and materiality are separated. Acceptance requires critical items to be visible in the executive note and linked to the action plan.

PROGRAM FRAMEWORK

7. Eight core deliverables create a reusable evidence package rather than a travel summary

CONTINUED · 02

01

7.4 Data Gap & Assumption Log

The log identifies missing, inconsistent, outdated or unverified information and records any interim assumption proposed for scoping or pricing. Each assumption has an owner, reason, consequence, expiry and validation action. An assumption cannot become a fact through repetition. Acceptance requires every material proposal qualification to trace to this log or later approved evidence.

02

7.5 Interface Map

The map connects the employer, operator, landlord or owner, OEMs, suppliers, utilities, authorities, workforce, designers, contractors and infrastructure providers to the decisions and physical boundaries they influence. It identifies information, access, approval, material, service and responsibility handoffs. Acceptance requires material interfaces to have an owner and an escalation route.

03

7.6 Priority Action Plan

The plan sequences corrective and evidence-closure actions according to dependency and decision need. The source brief uses 30/60/90-day horizons as a planning frame; these periods are not a guaranteed completion schedule. Each action states the intended result, accountable owner, required inputs, verification evidence and effect on the next gate.

04

7.7 Scope Options

The options describe minimum, recommended and extended routes for the next service stage. Each option states purpose, activities, client inputs, professional specialties, principal deliverables, exclusions, commercial basis and the uncertainty that would remain. The options support a decision; they do not disguise unresolved scope inside tiered marketing packages.

PROGRAM FRAMEWORK

7. Eight core deliverables create a reusable evidence package rather than a travel summary

CONTINUED · 03

7.8 Engagement Roadmap

The roadmap shows how the project could progress into feasibility, Pre-FEED, EPCM, PMC, commissioning, O&M or another defined work package. It identifies dependencies and gates rather than promising that every stage is required or that BEIREK will perform it. Acceptance requires the selected route to connect directly to the findings and client decision.

The complete evidence package includes a deliverable index, source and version references, limitation statement and review status. Client acceptance confirms that the material was received and factual comments were processed; it does not require the client to agree with every professional conclusion.

PROGRAM FRAMEWORK

8. Commercial architecture reflects uncertainty, team demand and travel exposure

The assessment can use a fixed professional fee where the site, duration, team, accessible scope and deliverables are sufficiently defined. Time-based expert rates may be more appropriate when multidisciplinary demand, document volume or uncertainty cannot be responsibly bounded. A hybrid structure can fix the core program while treating approved additional specialist effort on a time basis.

Flights, accommodation, visa, insurance, local transport, security and third-party services are reimbursable or booked directly by the client according to the agreed arrangement. They are separate from the professional fee. Where BEIREK must make reservations or third-party payments, the related budget is collected before commitment. Cancellation, delay and itinerary-change treatment is agreed because travel conditions can change independently of technical work.

Part of the assessment professional fee may, if expressly offered and documented, be credited against a subsequent EPCM, PMC or O&M engagement. This is a commercial option rather than an automatic entitlement. Travel and third-party expenses are not credited. A possible credit does not make the assessment free and does not require either party to enter a larger engagement.

The proposal identifies assumptions that affect effort: number and location of sites, travel days, working hours, access restrictions, languages, required disciplines, available records, interview count, evidence-capture permissions, reporting format and review cycle. A scope change is assessed when these conditions vary materially. Acceptance requires commercial terms to be signed by authorized parties before D3 and the client to understand that the service fee purchases the assessment and decision package, not a predetermined positive conclusion.

PROGRAM FRAMEWORK

9. Success is measured by decision quality and traceability, not by the number of observations

The program succeeds when the assessment changes the quality of the next commitment. This does not require a positive project recommendation. A well-supported hold, rescope or stop decision can preserve capital, management time and contractual clarity. Equally, a proceed decision creates value only when its conditions and retained risks remain visible.

Core acceptance measures include: the decision question is answered within the accessible scope; material findings link to controlled evidence or an explicit limitation; verified facts, observations, statements and assumptions are distinguishable; critical gaps have owners and closure actions; scope boundaries and interfaces are documented; the next-stage options respond to actual findings; professional responsibilities remain correctly allocated; and the final decision and conditions are recorded by an authorized owner.

Quality is reduced when the report contains unexplained photographs, generic recommendations, findings without consequences, actions without owners, ratings without definitions or a fixed-price implication unsupported by scope evidence. The document is reviewed for internal consistency among the executive conclusion, finding register, assumption log, action plan and engagement roadmap.

The client validates factual matters and provides corrections with supporting sources. BEIREK reviews whether new material changes the findings and maintains the version record. A disputed conclusion is not deleted simply to obtain acceptance; the disagreement and decision authority are recorded. The program closes when the agreed deliverables are issued, comments are processed, critical open information is identified and the next management decision is documented.

No acceptance measure states that all uncertainty has been eliminated. The service measures and structures uncertainty in proportion to the decision. Matters outside the accessible scope remain explicit conditions.

PROGRAM FRAMEWORK

10. Working schedule and governance are determined by readiness rather than a standard travel duration

The overall schedule depends on site location, document readiness, number of facilities, technical disciplines, travel permissions, security conditions, operating windows, interview availability and the intended decision date. The engagement therefore establishes a schedule after D2 rather than advertising a universal number of days.

A mobilization plan defines the data cut-off, question period, readiness review, travel and field dates, daily working windows, client and BEIREK leads, interview slots, closeout points, preliminary critical-issue route, draft decision note, factual review period and final issue. If essential access or evidence becomes unavailable, the parties decide whether to continue with a limitation, extend the fieldwork, arrange a follow-up or hold the readout.

Governance remains compact. The client sponsor owns business decisions and access. The BEIREK engagement lead owns method, team and deliverables. A site coordinator manages local logistics without replacing the sponsor's authority. Discipline experts own their observations within scope. A document controller or nominated coordinator maintains the evidence index where required. Meetings are used for decisions, not repeated status narration.

The main control records are the decision log, open-question and assumption log, access and restriction log, evidence index, critical findings register, action plan and change record. Each has a clear owner and data date. Email or messaging can communicate information but does not replace the controlled record for a material decision.

Acceptance requires the schedule to reflect real access and review constraints; field and reporting responsibilities to be named; material changes to be approved; and the client to understand which late information may require re-analysis or a revised version.

PROGRAM FRAMEWORK

11. Professional boundaries prevent observational work from being misrepresented as specialist assurance

The site assessment is observational and project-management-led. It is not detailed engineering, an issued-for-construction design, a certified condition or quantity survey, geotechnical investigation, structural certification, laboratory test, environmental or social impact assessment, title or legal due diligence, tax or accounting opinion, valuation, investment recommendation, insurance survey, security audit, fixed-price EPC offer or contractual assurance of future performance.

BEIREK may coordinate these professional work packages, define the management question they must answer and integrate their approved findings into the project decision. The qualified party retains responsibility for method, sampling, calculations, standards, professional sign-off and limitations. The client appoints the required specialists unless the agreed scope expressly provides another arrangement.

Observation cannot confirm concealed construction, internal equipment condition, subsurface conditions, hazardous materials, electrical integrity, structural capacity, remaining useful life, legal ownership, regulatory compliance or future performance without appropriate specialist evidence. Absence of an observed defect does not prove absence of a defect. Photographs show visible conditions at a moment in time and are not a complete record of the facility.

BEIREK does not guarantee price, schedule, permit, financing, asset output, availability, savings, revenue, contract award or investment outcome. Cost and schedule effects in the findings are directional unless a separately defined estimating or planning scope produces a controlled basis. Commercial and legal consequences remain subject to the applicable contracts and qualified advice.

Security, health and safety, operational control and emergency response remain with the responsible site parties under law and contract. BEIREK can stop its own work and report unsafe conditions through the agreed route; it does not assume facility control by attending the site. The boundary statement appears in the proposal and final decision note so the evidence package cannot reasonably be circulated as a broader assurance product.

BEIREK

PROJECT DISCOVERY & SITE ASSESSMENT

Technical Appendix

TECHNICAL MODULE

A1. Minimum information and readiness checklist

The information request is tailored to the decision. Not every item must exist before travel, but its absence is recorded and its consequence understood.

Information group	Representative inputs	Assessment use	Gap consequence
Corporate and authority	Legal entity, authorized sponsor, facility relationship, host contacts, access approval	Counterparty verification and decision authority	Mobilization may be held or conclusions limited
Project definition	Objective, current scope, target outcome, intended delivery model, previous proposals	Defines the project hypothesis and decision question	Site activity may not address a usable decision
Site and facility	Address, layouts, plot plans, building and utility information, access and logistics rules	Plans inspection route and physical interfaces	Additional survey or return visit may be required
Asset and equipment	Asset lists, drawings, OEM records, manuals, nameplates, modifications, warranty status	Tests identity, configuration and technical narrative	Fixed technical scope may remain unavailable
Operations and maintenance	Operating procedures, staffing, production or service records, alarms, failures, work orders, spares	Tests operating reality and maintenance capability	Condition and transition conclusions remain qualified
Project and contract	Existing studies, permits, contracts, claims, supplier and contractor records	Maps obligations, dependencies and responsibility boundaries	Commercial and delivery exposure may remain open
HSE and security	Site induction, hazards, restricted areas, permit-to-work, emergency and travel-security arrangements	Controls safe and authorized fieldwork	Travel or inspection can be held or reduced
Commercial and schedule	Budget expectations, milestones, shutdown windows, procurement needs, payment assumptions	Links findings to price and schedule decisions	Proposal basis remains conditional

TECHNICAL MODULE

A1. Minimum information and readiness checklist

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The readiness review assigns each item one of five states: received and current; received with validation need; superseded or inconsistent; requested and pending; or unavailable. Materiality is then assessed against the decision question. A missing file that does not affect the intended decision is not made critical, while one missing authority or design record can hold mobilization or prevent a commitment.

The client confirms that provided information is complete to the best of its knowledge and identifies restrictions. BEIREK records reliance limitations rather than certifying authenticity. D2 passes when the available information, known gaps, accessible field scope and planned interviews can produce a decision-relevant assessment.

TECHNICAL MODULE

A2. Interview and observation protocol

Interviews are planned by role and decision relevance. Potential participants include the sponsor, facility manager, operations lead, maintenance lead, engineering or project lead, HSE representative, commercial or procurement lead, finance representative, IT or controls lead, landlord or owner representative, OEM, current contractor, utility interface and relevant authority contact. The actual list depends on the project and access.

Questions test responsibility, evidence and exceptions. The interviewer asks what happens, who decides, which record proves it, what changed, what remains unresolved and what consequence follows. A process description is compared with available records and field conditions. Interview notes identify participant, role, date, subject and whether the statement is supported, contradicted or not tested.

Observation uses an agreed route and checklist while allowing material emerging issues to be followed within authority. Each record distinguishes location, visible condition, expected or claimed condition, evidence type, potential relevance and required follow-up. Findings are not diagnosed beyond the team's competence or the available method. If an immediate concern is identified, BEIREK informs the authorized site contact and records the communication.

Evidence capture respects confidentiality, safety and site rules. No photograph, scan, copy or recording is made without permission. Sensitive data is stored and shared according to the engagement protocol. Where evidence cannot be retained, the note records what was shown, by whom, when, for what purpose and with what limitation. The field file is closed daily to reduce loss of context.

TECHNICAL MODULE

A2. Interview and observation protocol

CONTINUED · 02

The daily field closeout uses a simple reconciliation: planned questions addressed; new questions opened; records received; records shown but not retained; areas inspected; areas restricted; people interviewed; material statements requiring corroboration; immediate issues communicated; and actions for the next field period. The client coordinator can correct a location or participant fact without being asked to approve emerging conclusions. BEIREK's engagement lead confirms that the evidence index and notes are intelligible to a reviewer who was not present. This check reduces dependence on memory and prevents the final report from being reconstructed from an unclassified photograph folder or informal messages.

Where language support is required, the interpreter's role and technical limitations are recorded; material translated statements are confirmed through a source document or responsible participant when they could change a decision.

TECHNICAL MODULE

A3. Finding classification and confidence system

The classification system keeps urgency, materiality and confidence separate. A finding may be urgent for safety but outside the commercial scope; another may have major capital consequences but require further testing before confirmation.

Field	Controlled values	Purpose
Decision class	Proceed condition, hold point, rescope input, specialist investigation, stop consideration	Shows how the finding affects the next decision
Materiality	Critical, high, medium, low, observation	Indicates potential effect on scope, responsibility, cost, schedule or performance
Confidence	Verified, corroborated, observed-not-tested, reported-not-verified, not assessed	Prevents inference from being presented as fact
Time need	Immediate, before proposal, before mobilization, before execution, monitor	Links action to the next irreversible commitment
Ownership	Client, BEIREK, host, OEM/supplier, contractor, specialist, authority, joint	Identifies who must act or decide
Closure evidence	Decision, controlled document, inspection, test, calculation, professional opinion, contract amendment	Defines what proves the item is closed

The finding statement uses neutral language. It describes the condition and evidence before stating the implication. Recommendations are proportional to the decision: obtain a missing source, verify through a specialist, amend a responsibility boundary, include a price qualification, change the visit scope or stop further commitment. A generic instruction to “monitor” is not accepted without an owner, trigger and response.

Closure does not mean deleting the record. The register retains the original finding, action, evidence, decision, residual risk and date. If the client accepts a risk rather than removing it, the authorized acceptance and conditions remain visible.

TECHNICAL MODULE

A3. Finding classification and confidence system

CONTINUED · 02

Classification is calibrated before final issue. The engagement lead reviews whether comparable effects have received comparable materiality, whether confidence reflects the actual evidence and whether the requested closure method can resolve the stated uncertainty. A specialist may be asked to refine the required investigation without being asked to endorse BEIREK's management conclusion. If a finding changes class after new evidence, the register records the previous class, reason and decision effect. This prevents silent regrading and allows the executive note to remain consistent with the detailed evidence.

The register also identifies linked findings so that one root condition is not counted repeatedly as unrelated evidence. Closing a parent condition prompts review of the connected records rather than automatic closure.

TECHNICAL MODULE

A4. Site Reality Baseline structure

The baseline is organized so a later team can understand what was known at the assessment date. It normally covers the facility and operating purpose; site and access; physical layout; relevant assets and equipment; utilities and infrastructure; operating model and workforce; maintenance and spare-parts system; documents and data; permits and authority interfaces; suppliers and service providers; logistics and security; and material restrictions.

For each domain, the baseline records the stated condition, observed condition, supporting evidence, confidence, material discrepancy and decision relevance. It avoids turning observations into an artificial composite score. A critical authority or infrastructure gap should not be hidden by strong ratings elsewhere.

The baseline is versioned. New evidence received after the visit is identified as post-visit information and reviewed for its effect. The assessment date matters because operations, equipment, access and stakeholders can change. Reuse in a later engagement requires confirmation that the underlying conditions remain current.

Acceptance requires the baseline to reconcile with the finding register and assumption log; major discrepancies to be visible; and readers to understand which conditions were outside access or required specialist verification.

The baseline includes a source hierarchy. Current controlled documents and authorized records are normally stronger than an undated copy, recollection or visual inference, but relevance is determined for the actual question. A recently prepared presentation does not override an older approved drawing merely because it is newer. Where sources conflict, the baseline identifies both, assigns a resolution owner and avoids selecting the more convenient version without evidence. Material conditions are linked to photographs or field references only where capture was authorized. This structure lets the next team distinguish the facility reality from the project narrative and focus additional work on the discrepancies that can alter commitment.

TECHNICAL MODULE

A4. Site Reality Baseline structure

CONTINUED · 02

Update triggers include a material shutdown or failure, asset modification, change of owner or operator, new access restriction, revised project objective, new authority condition or specialist result that changes a critical assumption. The updated baseline states what changed and what did not; it does not rewrite the original assessment date.

Information that remains sensitive can be referenced through a controlled identifier and custodian instead of reproduced. The baseline still records its decision relevance, review status and any reliance limit.

TECHNICAL MODULE

A5. Mobilization readiness record

The D3 record confirms service acceptance, team and roles, travel itinerary, host and site access, visa and insurance, transport and accommodation, security assessment, communication and emergency contacts, health requirements, site induction, personal protective equipment, restricted activities, information-security rules, weather and operating constraints, reimbursable budget and cancellation route.

Readiness is reassessed if the location, host, itinerary, security situation, site condition, operating window or inspection scope changes. A previous clearance does not compel travel under new conditions. BEIREK documents its decision and informs the client through the nominated sponsor.

The record also protects delivery quality. An unrealistic itinerary, unavailable interpreter, insufficient field time, missing discipline or prohibited evidence capture can make the assessment ineffective even if physical travel is safe. These conditions are treated as scope and confidence issues, not merely logistics.

The final readiness decision identifies any conditional clearance and its expiry. A condition might require a named site escort, confirmation of an operating window, advance receipt of a critical record or an updated security check. If the condition is not met by the stated point, mobilization returns to hold without implying breach of the later delivery scope. Reservations, sunk expenses and client urgency do not override the health, authority or evidence standard.

The clearance record is retained with the engagement evidence.

TECHNICAL MODULE

A5. Mobilization readiness record

CONTINUED · 02

The record is reviewed by the BEIREK engagement lead and the nominated client sponsor for their respective responsibilities. Client confirmation establishes access, hosting and supplied information; BEIREK confirmation establishes team and travel suitability. Neither signature transfers the host's operational duties or waives conditions that arise after approval. The mobilization message references the approved record and lists any items to reconfirm on arrival. The opening site briefing then validates that the field situation still corresponds with the cleared basis before inspection begins.

If a new team member joins after clearance, competence, briefing, travel and access requirements are checked for that person rather than assumed from the original team approval.

TECHNICAL MODULE

A6. Decision note and next-engagement scope template

The final note contains: decision question; executive recommendation; engagement scope and dates; parties and authority; documents and data reviewed; areas and people accessed; method and limitations; Site Reality Baseline; critical findings; data gaps and assumptions; interface map; immediate and 30/60/90-day actions where appropriate; next-stage scope options; commercial and travel principles; professional boundaries; disputed or unresolved matters; and authorized decision.

A proposed next engagement states the problem to solve, starting evidence, scope, workstreams, client inputs, third-party specialties, principal deliverables, decision gates, acceptance criteria, exclusions, schedule basis, team basis and commercial assumptions. It does not inherit hidden obligations from the visit. Any fixed price or definitive schedule is issued only after the relevant uncertainty is sufficiently closed or expressly allocated.

The decision note is the formal close of Project Discovery & Site Assessment. It remains valid for the described evidence date and conditions, subject to its limitations. Material change in facility condition, project objective, counterparty, access, regulation, scope or delivery model may require an update rather than automatic reuse.

Before issue, the note undergoes a source and consistency review. Finding identifiers, responsibility owners, dates, limitations and next-stage conditions are reconciled across the executive conclusion and supporting registers. Factual client comments are either incorporated with evidence or recorded as unresolved. The issue status and intended distribution are stated so a draft cannot be mistaken for an approved commitment basis.

TECHNICAL MODULE

A6. Decision note and next-engagement scope template

CONTINUED · 02

If the client selects a next-scope option, the selected decision is copied into the new engagement record together with prerequisites still open at award. The new team acknowledges those conditions and identifies which gate will close each one. If no option is selected, the decision note remains useful as a standalone assessment rather than being rewritten as a sales proposal. Distribution to a lender, contractor, insurer or other third party requires review of intended reliance and confidentiality; the original client acceptance does not automatically authorize third-party reliance.

Superseded drafts remain identifiable and are not silently overwritten. The final index points to the approved issue and supporting registers used for the decision.

TECHNICAL MODULE

A7. Decision-control examples for different starting conditions

The same method applies across sectors, but the decision question and evidence emphasis change with the starting condition. The following examples explain how the controls are adapted without claiming a predetermined technical result.

A7.1 Existing facility rehabilitation or modernization

An owner may describe a modernization need through a desired output, an equipment list or a previous supplier proposal. The assessment first establishes the operating purpose, current constraint and exact boundary of the proposed change. It then compares accessible drawings, asset records, modification history, failure and maintenance information, operating restrictions, utilities and interfaces with visible conditions and responsible personnel's explanations.

The decision is not whether the site "looks suitable." It is whether enough evidence exists to define the next engineering and commercial scope. Unknown structural capacity, internal equipment condition, control-system compatibility, hazardous materials, shutdown needs or permit requirements become specified investigation packages. A mismatch between the recorded and installed configuration becomes a design-input and price qualification, not a hidden contingency.

The recommended output may be a rehabilitation definition, specialist survey plan, operating-window strategy, responsibility map and staged scope. The gate passes when the owner can decide which uncertainty to close, which condition to accept and which work can responsibly enter feasibility, design or procurement. The assessment does not certify the existing asset or guarantee that modernization will produce a stated output.

TECHNICAL MODULE

A7. Decision-control examples for different starting conditions

CONTINUED · 02

A7.2 New project or undeveloped site

At an undeveloped site, physical evidence may be limited, but access, topography, surrounding uses, utilities, transport routes, environmental and social context, security, authority interfaces and development constraints can still affect project reality. The desktop phase distinguishes stated land or site control, project purpose, proposed capacity or facility concept, infrastructure assumptions and schedule expectations from verified sources.

The field phase observes accessible conditions and tests the plausibility of the stated delivery narrative. It does not replace boundary, topographic, geotechnical, environmental, structural, resource or other certified studies. Instead, it defines which professional investigations are necessary, their sequence, their decision purpose and the assumptions that cannot be carried into a price before results exist.

The readout may recommend a controlled feasibility route, site alternatives, further data acquisition, authority engagement, concept options or a stop condition. Acceptance means the sponsor understands the difference between an attractive location, a technically developable concept and an institutionally deliverable project. No land right, permit, utility capacity, financeability or construction readiness is inferred from an introductory visit.

A7.3 Operating-service, commissioning or O&M transition

When the potential engagement concerns commissioning, operating support or O&M, the assessment gives greater weight to asset identity, completion status, test evidence, outstanding defects, operating authority, competence, procedures, spares, software and data access, warranty interfaces, service contracts, safety systems and the condition of handover information. A statement that the plant is “complete” or “operational” is decomposed into technical completion, safe energization or start-up, functional testing, performance testing, contractual acceptance and stable operating capability as applicable.

TECHNICAL MODULE

A7. Decision-control examples for different starting conditions

CONTINUED · 03

The site review tests whether the prospective service provider would receive the information, access, authority, tools, personnel and contractual boundaries needed to perform. Missing as-built records, unresolved defects, inaccessible software, unclear OEM support, inadequate spares or conflicting operating authority can materially change scope and risk. These are recorded as transition conditions rather than assumed to be solved after award.

The output may include a transition-readiness baseline, missing-information list, priority stabilization actions, specialist test needs, operating responsibility matrix and phased engagement option. The decision gate passes only when accepted residual conditions are visible and the client understands what BEIREK can manage, what the site must provide and what remains with OEMs, contractors or qualified specialists. The assessment does not constitute acceptance of the asset or a guarantee of availability or performance.

A7.4 Cross-example control rule

In all three starting conditions, the controls follow the same chain: define the decision; identify the evidence that should support it; verify accessible reality; classify discrepancies and uncertainty; assign actions and professional owners; and authorize only the next commitment that the evidence can support. If a requested conclusion is broader than the method, BEIREK narrows the conclusion or recommends additional work. This rule preserves the usefulness of the service across energy, industry, manufacturing and infrastructure without turning the assessment into a generic checklist.

TECHNICAL MODULE

A7. Decision-control examples for different starting conditions

CONTINUED · 04

These examples do not create a default scope. Before each engagement, BEIREK selects only the domains that can affect the stated decision and records why they are included. The client confirms the operating context, known constraints and intended use of the output. The visit plan then connects each priority question to a document, interview, observable condition or separate specialist requirement. During the readout, unsupported questions remain open rather than being answered through analogy with another facility. This discipline keeps the assessment proportionate: a narrowly defined decision does not require an artificial whole-site audit, while a material long-term responsibility is not accepted on the basis of a short walk-through. Any later reuse of the examples must therefore be tested against the actual facility, jurisdiction, contract structure, available evidence and decision date.

The selected control set is recorded in the proposal and repeated in the decision note. This allows a later reviewer to see which domains were intentionally examined, which were screened only at a high level and which were excluded or assigned to another professional. If the client changes the intended use of the output—for example, from internal scoping to contractor pricing—the adequacy of the evidence and the required review depth are reassessed before the document is relied upon for that new decision.

BEIREK

PROGRAM CONCLUSION

CONCLUSION

Project Discovery & Site Assessment

Project Discovery & Site Assessment creates a disciplined boundary between opportunity interest and delivery responsibility. It enables BEIREK and the client to commit management attention, technical resources and capital only after the project described at the desk has been tested against the accessible technical, commercial and operational reality on site. The first step is a D0 Opportunity Intake: identify the authorized sponsor, the facility, the proposed next engagement and the single decision that the assessment must change. BEIREK can then determine whether an introductory review is sufficient, a paid site assessment is justified, or another specialist action must occur first.