



# **Project Controls Management (PCM) Framework for a Period of Three (3) Years**

End-user Presentation: TNPA RFP BRIEFING SESSION  
Date : 21/08/202

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## Purpose

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1. The purpose of this procurement is to establish a three-year multi-disciplinary Project Controls Management (PCM) Framework to provide TNPA with specialist resources on an as-and-when-required basis across the Eastern, Central and Western Regions. The framework will augment TNPA's internal capacity and provide specialist support in Project Controls, Cost Management, Quantity Surveying, Planning & Scheduling, Risk Management, Project Administration and Document Control across TNPA's Capital Investment Programme.



## Business Need

1. TNPA is experiencing a significant shortage of specialist resources within critical Project Controls disciplines. These capacity constraints have impacted the effective oversight and management of the Capital Investment Programme and have contributed to challenges relating to:
  - ☐ Cost forecasting, budgeting and cost control.
  - ☐ Planning, scheduling and programme monitoring.
  - ☐ Contract administration and Compensation Event management.
  - ☐ Project risk management and reporting.
  - ☐ Governance, assurance and executive reporting.
  - ☐ Document management and records compliance.
  - ☐ Project performance monitoring and decision-making.
2. The shortage of these critical skills has also contributed to recurring audit findings relating to project governance, project controls, contract administration, document management, compliance and risk management processes. The proposed framework seeks to address these deficiencies through access to suitably qualified and experienced specialist resources.



## Strategic Objective

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### 1. The framework seeks to:

- ☐ Strengthen governance and project assurance across TNPA's capital programme.
- ☐ Improve project delivery performance and reporting accuracy.
- ☐ Improve forecasting of project costs, schedules and risks.
- ☐ Provide early warning of cost overruns, schedule delays and emerging risks through integrated Project Controls and Earned Value Management (EVM).
- ☐ Standardise Project Controls methodologies across all TNPA Regions.
- ☐ Improve executive decision-making through reliable project information.
- ☐ Support mentorship, skills transfer and professional development.



## Contract Duration and Delivery Model

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1. Framework Duration: Three (3) Years.
2. Services will be procured through Task Orders issued on an as-and-when-required basis.
3. No work is guaranteed upfront and appointments will only be made when a specific requirement arises.
4. Separate framework panels will be established for:
  - ☐ Eastern Region (Durban and Richards Bay).
  - ☐ Central Region (East London, Ngqura and Port Elizabeth).
  - ☐ Western Region (Cape Town, Saldanha, Mossel Bay, Port Nolloth and Boegoebaai).



## Scope of Work

The framework comprises five specialist disciplines designed to provide comprehensive Project Controls support throughout the project lifecycle.

| Group A – Project Controls & Cost Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Group B – Quantity Surveying                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Project Controls Manager</li> <li><input type="checkbox"/> Lead Cost Engineer</li> <li><input type="checkbox"/> Cost Engineer</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li><input type="checkbox"/> Lead Quantity Surveyor</li> <li><input type="checkbox"/> Quantity Surveyor</li> </ul>                                                                                                                                                                                                                                                                                                                          |
| Key Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Key Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Development of Project Controls Plans and Strategies.</li> <li><input type="checkbox"/> Cost Estimating, Budgeting and Forecasting.</li> <li><input type="checkbox"/> Cost Control and Cashflow Management.</li> <li><input type="checkbox"/> Earned Value Management (EVM).</li> <li><input type="checkbox"/> Change Management and Compensation Event Monitoring.</li> <li><input type="checkbox"/> Integrated Project Performance Reporting.</li> <li><input type="checkbox"/> Portfolio and Executive Reporting.</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Cost Planning and Cost Estimating.</li> <li><input type="checkbox"/> Bills of Quantities.</li> <li><input type="checkbox"/> Tender Evaluations.</li> <li><input type="checkbox"/> Payment Certification.</li> <li><input type="checkbox"/> Compensation Event Assessments.</li> <li><input type="checkbox"/> Commercial Administration.</li> <li><input type="checkbox"/> Final Account Management.</li> </ul> |



## Scope of Work

The framework comprises five specialist disciplines designed to provide comprehensive Project Controls support throughout the project lifecycle.

| Group C – Planning & Scheduling                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Group D – Project Administration & Document Control                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Lead Project Planner</li> <li><input type="checkbox"/> Project Planner / Scheduler</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li><input type="checkbox"/> Document Controller</li> <li><input type="checkbox"/> Project Administrator</li> </ul>                                                                                                                                                                                                                                                                                                                      |
| Key Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Key Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Primavera P6 and MS Project Scheduling.</li> <li><input type="checkbox"/> Programme Development and Maintenance.</li> <li><input type="checkbox"/> Critical Path Analysis.</li> <li><input type="checkbox"/> Resource Planning and Forecasting.</li> <li><input type="checkbox"/> Progress Measurement and Reporting.</li> <li><input type="checkbox"/> Recovery Programme Development.</li> <li><input type="checkbox"/> Contractor Programme Reviews and Assurance.</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Project Administration Support.</li> <li><input type="checkbox"/> Document Management and Records Control.</li> <li><input type="checkbox"/> Electronic Document Management Systems (EDMS).</li> <li><input type="checkbox"/> Governance and Compliance Reporting.</li> <li><input type="checkbox"/> Audit Support.</li> <li><input type="checkbox"/> Information and Correspondence Management.</li> </ul> |



## Scope of Work

The framework comprises five specialist disciplines designed to provide comprehensive Project Controls support throughout the project lifecycle.

### Group E – Risk Management

☐ Risk Management Professional

#### Key Responsibilities

- ☐ Development of Risk Management Plans.
- ☐ Risk Assessments and Workshops.
- ☐ Quantitative and Qualitative Risk Analysis.
- ☐ Risk Registers and Mitigation Actions.
- ☐ Contingency Assessments.
- ☐ Risk Governance and Assurance Reporting.
- ☐ Risk Maturity Assessments.



## Eligibility and Evaluation Approach

1. The evaluation model is based on the assessment of named specialist resources, rather than company experience alone. Tenderers are required to nominate suitably qualified, professionally registered and experienced individuals for each discipline within the Group(s) and Region(s) for which they are bidding. The evaluation focuses on the actual resources that will support TNPA projects.
2. Key requirements include:
  - ☐ Tenderers may bid for one or more Groups and Regions.
  - ☐ All disciplines within a selected Group must be submitted.
  - ☐ A minimum of one compliant CV is required for each discipline and Region selected.
  - ☐ Resources must possess the prescribed qualifications, registrations and experience.
  - ☐ Failure of any discipline within a Group renders the entire Group non-compliant.



## Resource Restrictions and CV Evaluation Methodology

### Resource Restrictions

- ☐ To ensure genuine resource availability and capacity:
  - ☐ A minimum of one CV must be submitted for every discipline within a selected Group.
  - ☐ The same individual may not be nominated in more than one Region.
  - ☐ The same individual may not be nominated for more than one discipline.
  - ☐ Separate compliant resources must be submitted for every Region and every discipline.
- ☐ Tenderers bidding in multiple Regions must demonstrate sufficient resource depth across all Regions.

### Example

*A tenderer bidding for **Group A** in both the Eastern and Central Regions would require:*

- 2 × Project Controls Managers.
- 2 × Lead Cost Engineers.
- 2 × Cost Engineers.



## Resource Restrictions and CV Evaluation Methodology

### CV Evaluation Methodology

*Each CV will be assessed against:*

| Qualifications                                                                                                                                                                                                                                                                                                                                                                                                                         | Professional Registration (**Pre-Qual)                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Resources must possess the minimum prescribed academic qualifications, generally ranging from NQF Level 6 to NQF Level 7.                                                                                                                                                                                                                                                                                     | <input type="checkbox"/> Where applicable, resources must hold valid registration with recognised bodies such as: <ul style="list-style-type: none"> <li>▪ ECSA</li> <li>▪ SACQSP</li> <li>▪ SACPCMP</li> <li>▪ PMI</li> <li>▪ AACE International</li> <li>▪ IRMSA</li> </ul> <input type="checkbox"/> Registrations will be independently verified. |
| Experience                                                                                                                                                                                                                                                                                                                                                                                                                             | Supporting Documentation                                                                                                                                                                                                                                                                                                                             |
| <input type="checkbox"/> Resources must demonstrate experience on infrastructure projects ranging from approximately: <ul style="list-style-type: none"> <li>▪ R35 million (support disciplines).</li> <li>▪ R75 million (Risk Management).</li> <li>▪ R100 million – R150 million (Planning disciplines).</li> <li>▪ R200 million (Lead QS and Lead Cost Engineers).</li> <li>▪ R300 million+ (Project Controls Managers).</li> </ul> | Each submission must include: <ul style="list-style-type: none"> <li>▪ Signed CV.</li> <li>▪ Certified ID.</li> <li>▪ Certified qualifications.</li> <li>▪ Professional registration certificates.</li> <li>▪ Evidence of project experience.</li> <li>▪ Authorisation to submit the resource.</li> </ul>                                            |



## Resource Restrictions and CV Evaluation Methodology

### Pass / Fail Principle

**The eligibility evaluation is a compliance assessment.**

- ☐ A discipline is compliant only if the nominated resource satisfies all minimum requirements relating to:
  - Qualifications.
  - Registration.
  - Experience.
  - Project value exposure.
  - Supporting documentation.
- ☐ If one discipline fails, the entire Group becomes non-responsive.



## Framework Appointment Approach

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- ❑ The procurement strategy is a multi-supplier regional framework.
  - ❑ In each Group and Region, tenderers will be evaluated and ranked in accordance with the prescribed tender criteria. Subject to the availability of responsive and qualifying bids, Transnet shall appoint a minimum of three (3) and may appoint up to fifteen (15) of the highest-ranked tenderers to the framework. Accordingly, admission to the framework is limited to the appointed tenderers, and not all responsive tenderers will necessarily be admitted.
  - ❑ Framework participants will compete for future Task Orders issued within their respective Regions and disciplines.
  - ❑ Work will therefore remain competitive throughout the contract lifecycle.



## Pricing and Commercial Model

### ❑ Commercial Contracting Strategy

- ❑ The procurement is structured as a Schedule of Rates Framework Agreement rather than a conventional lump-sum professional services contract. The purpose of the pricing schedule is to establish pre-approved resource rates for specialist Project Controls services across all TNPA Regions for the duration of the three-year framework.
- ❑ Importantly, appointment to the framework does not constitute a commitment of work, expenditure or guaranteed workload. Services will only be procured when project requirements arise and project-specific Task Orders are issued.
- ❑ Accordingly, the framework provides TNPA with access to specialist resources and pre-established commercial rates without committing TNPA to a predetermined contract value or level of expenditure.



## Pricing and Commercial Model

### ❑ Pricing Structure

| Tenderers are required to submit hourly rates for:                                                                                                                                                                                                                                                                                                           | The pricing schedule is structured according to:                                                                                                                   | Evaluation Hours                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>❑ Project Controls Managers.</li> <li>❑ Lead Cost Engineers and Cost Engineers.</li> <li>❑ Lead Quantity Surveyors and Quantity Surveyors.</li> <li>❑ Lead Planners and Project Planners/Schedulers.</li> <li>❑ Project Administrators and Document Controllers.</li> <li>❑ Risk Management Professionals.</li> </ul> | <ul style="list-style-type: none"> <li>❑ Region.</li> <li>❑ Port.</li> <li>❑ Discipline.</li> <li>❑ Evaluation Hours.</li> <li>❑ Tendered Hourly Rates.</li> </ul> | <p><i>"are solely for the purpose of evaluating the tender and do not reflect in any way the value of an appointment."</i></p> <p>Therefore, the evaluation hours:</p> <ul style="list-style-type: none"> <li>❑ Do not represent anticipated workload.</li> <li>❑ Do not constitute forecast demand.</li> <li>❑ Do not establish a contract value.</li> <li>❑ Are used purely for comparative tender evaluation purposes.</li> </ul> |



## Pricing and Commercial Model

### ❑ Pricing Structure

| Task Order-Based Procurement                                                                                                                                                                                                                                                                                                                                                                                                     | Rate Escalation                                                                                                                                                                                                                                                                            | Travel and Disbursements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>❑ Once the framework has been established:           <ul style="list-style-type: none"> <li>▪ TNPA identifies a project requirement.</li> <li>▪ A project-specific scope and Task Order are developed.</li> <li>▪ Framework participants compete for the opportunity.</li> <li>▪ Proposals are evaluated.</li> <li>▪ The successful service provider is appointed.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>❑ Rates are fixed during Year 1.</li> <li>❑ Annual escalation is permitted thereafter.</li> <li>❑ Escalation is linked to Statistics South Africa CPI (P0141).</li> <li>❑ 85% of rates are CPI-adjustable.</li> <li>❑ 15% remains fixed.</li> </ul> | <ul style="list-style-type: none"> <li>❑ Tendered rates include:           <ul style="list-style-type: none"> <li>▪ Labour.</li> <li>▪ Overheads.</li> <li>▪ Profit.</li> <li>▪ On-costs.</li> <li>▪ Operating expenses.</li> </ul> </li> <li>❑ Approved project travel may be reimbursed separately subject to:           <ul style="list-style-type: none"> <li>▪ Prior approval.</li> <li>▪ Economy-class travel.</li> <li>▪ Treasury limits.</li> <li>▪ Reasonable accommodation costs.</li> <li>▪ AA reimbursement rates.</li> </ul> </li> </ul> |



## Skills Development Requirement

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- ❑ The framework incorporates a mandatory Contract Skills Development Goal (CSDG).
- ❑ Requirements include:
  - 7.5% of invoiced hours must be allocated to candidate professionals or graduates.
  - Mandatory mentorship and skills transfer.
  - TNPA may second candidate staff to consultants.
  - Financial penalties apply for non-achievement.

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# Thank you

Professional Project Controls Management (PCM) Framework