

SCOPE OF WORK
WORKFLOW SPECIFIC -
INTELLIGENT BUSINESS PROCESS
MANAGEMENT TOOL

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1 Overview and Objectives

1.1 Overview

This document is to be used by Tenderers when responding to the Tender on fixed price deliverable basis. This document supplements the Requirement Specifications document and states the full scope of work and services required from the successful Vendor.

1.2 Definitions and Abbreviations

Term / Abbreviation	Definition / Description
AD	Active Directory
TL	Technical Lead
BPA	Business Process Automation

1.3 Reference Material

Document Name
DEM-03372-F6L4_BRSF_iBPM_05052023_Workflow specific_Intelligent BPMTTool_signed
ACNAC Replacement Project - Direct Customer Major Functional Specification
ACNAC Replacement Project - Direct Customer Minor Functional Specification
DEM-02945-X5B8_BRSC_SET system changes_Signed
IRCAM GIT FRS 042022 Review-signed
R17640130 -Group IT Technical Specification - BiTop100
URS_eForms Portal_Final_Signed
URS_R17308341 eForms Attachments Storing_Signed
URS_R17322787_eForms Invariable Views_Signed
LAD LAC for Enterprise Workflow Engine
EAAB LAD Enterprise Workflow Automation Platform (iBPMS)
Web Services Security Standard
Cloud Risk Assessment - Intelligent Business Process Management (K2)
Eskom ITO - Schedule Q - Intelligent Business Process Management (K2)

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1.4 Background

Eskom's current enterprise Business Process Automation (BPA) tool contract expired in June 2019. BPA is used on various solutions. One of these BPA solution is a business essential system called ACNAC. The absence of the maintenance and support contract means that Eskom no longer have support from the vendor. The current BPA tool has been in Eskom for more than 10 years.

Eskom therefore need to test the market for a BPA tool to see what the market has to offer and to align with the orgaBPAational commercial process of open, fairness and equitable process and the procurement of services. Since BPA is a core pillar for digital transformation, absence of this capability will impact Eskom's ability to digitally transform.

The business challenge that may occur, should a BPA tool not be placed, is that in the event we experience serious issues on the current business BPA environment we won't get support from the vendor which may affect customer and retail operations which may ultimately affect Eskom's licensing requirements from the regulator.

1.5 Problem Statement

- Eskom's BPA system is currently unsupported.
- The maintenance and support contract has expired (30 June 2019) and can't be extended further as per National Treasury instruction.
- This means that the current production platform cannot be maintained and supported by the vendor.

1.6 Solution Objectives

Provide & implement an available, secure, optimised, extensible and efficient Business Process Automation System that meets the stated Business Requirements.

2 BPA Replacement Scope of Work & Deliverables

2.1 Approach

- Replace the current BPA platform with a modern solution to advance Eskom's Process automation objectives.
- The Vendor is responsible for the delivery of a full end to end solution and the project within the required timelines.
- The project and solution must comply with Eskom stage gates and governance milestones and deliverables.
- A phased rollout approach with quick to market deliverables (agility) is mandatory.

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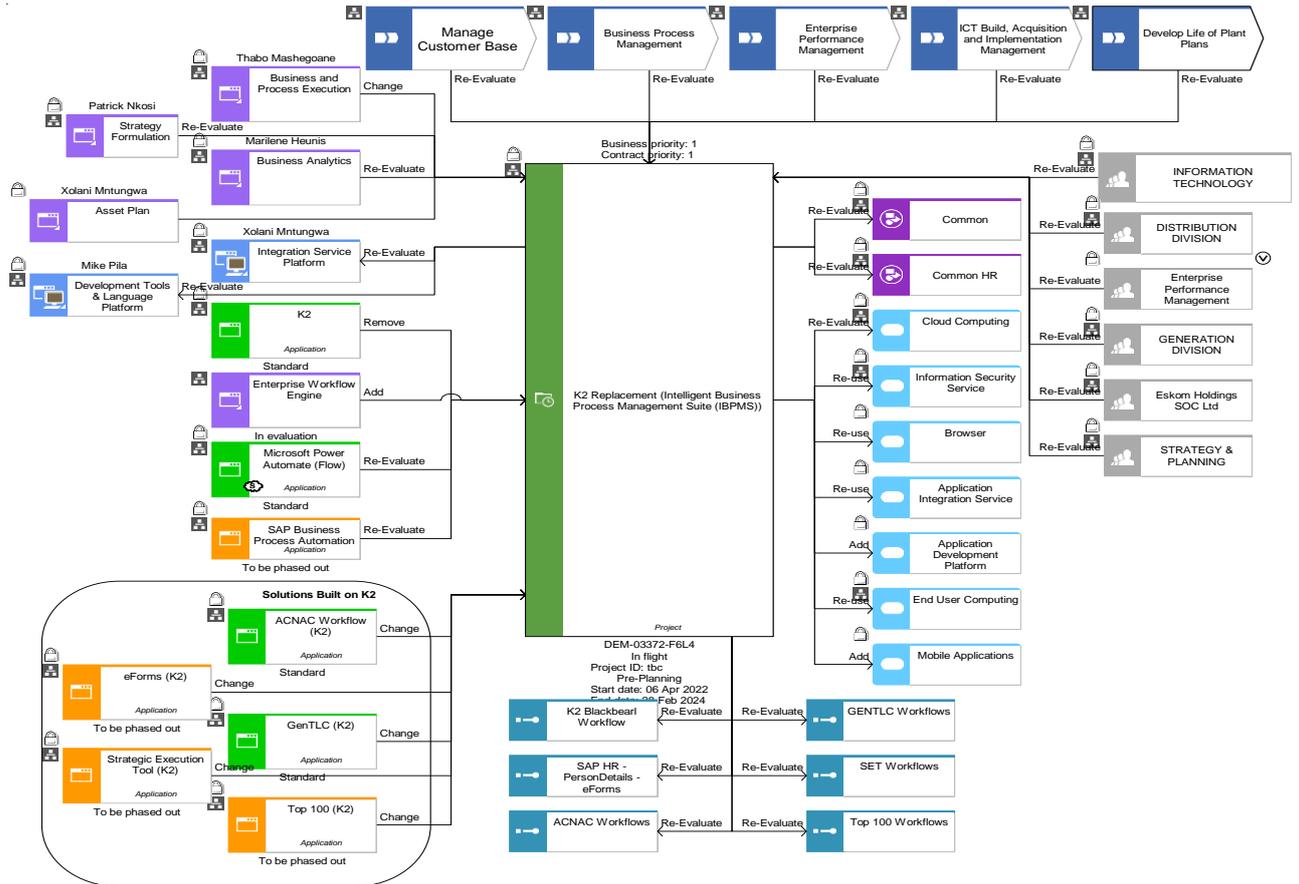
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- The project must be fully completed & system fully operational within twenty-four to thirty-six months of the kick-off meeting. A six-month stabilisation period must be included in this timeframe.

2.2 Scope

1. Solution scope context

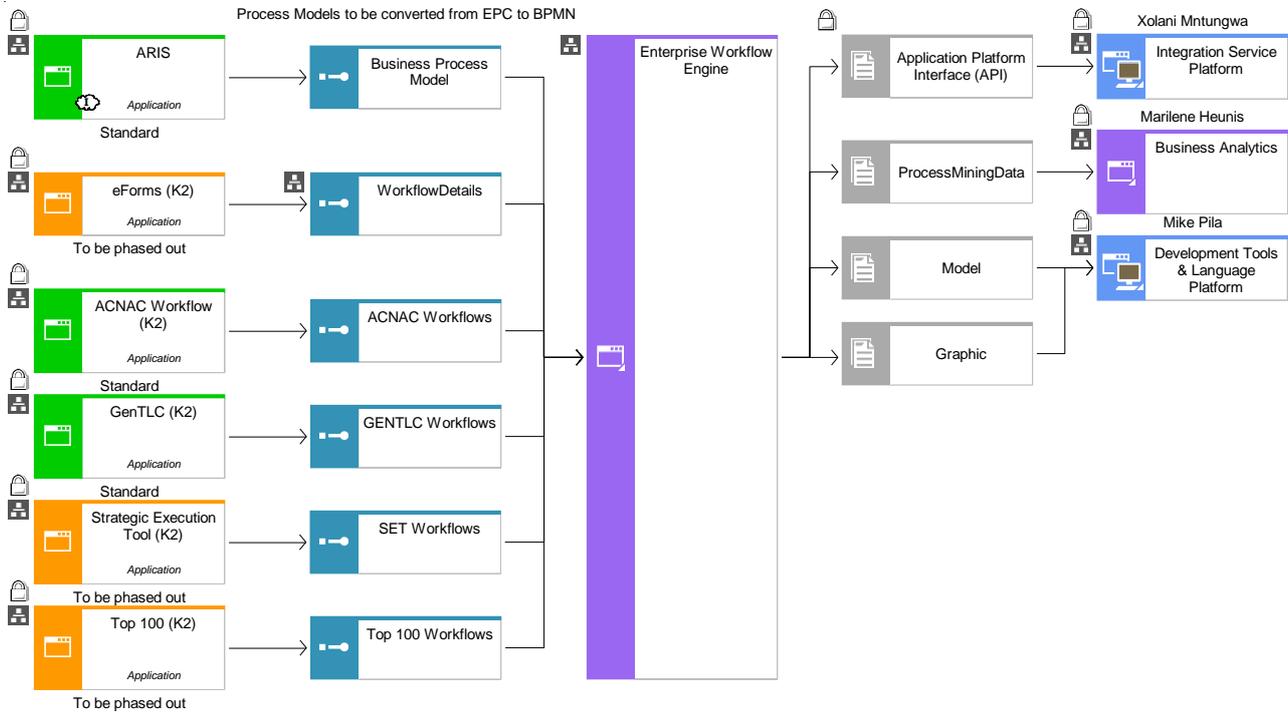


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2. Application communication diagram



The scope below must be completed by meeting all the stated business requirements.

Scope Item	Description and Deliverable
Software Licensing	Provision of the necessary software licences with maintenance & support for a 5-year period
Cloud Requirements	<p>Cloud infrastructure provisioning for QA, Pre-prod, Development, Production and DR. Service provider to ensure provisioning is done for QA, and other environments which will be needed for development, testing, training, and go-live as and when required. Eskom is going to continue with changes as and when needed by Business so the provisioning of these environments when required is important. The solution must be platform as a service that should operate in a hybrid IT environment.</p> <p>Service Provider to ensure that it secures the user's or customer's consent to process their personal information.</p> <p>Confirm how the solution will adhere to POPI Act so that Eskom and Eskom Customer will be protected. Confirm how Eskom data will be secured in line with POPIA and where will be stored. Eskom requires a confirmation letter</p>

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Scope Item	Description and Deliverable
	that the cloud storage will be within the borders of South Africa or European Union.
Solution Design	Provide BPA solution designs for approval by Group IT Architecture
Solution Capabilities	<p>The BPA platform should at the minimum have the following capabilities:</p> <p>Process Modeling</p> <p>Capability of a BPA tool to enable enterprises to model their simple and complex business processes. The platform must have a capability to also accept processes built in other modeling toolsets.</p> <p>Process Orchestration</p> <p>Capability of a BPA tool to orchestrate a complex process comprising multiple stakeholders, including humans, applications, and machines.</p> <p>Decision Automation</p> <p>Capability of a BPA tool to define business rules, recommendations, or decision automation engines, which provide guidance for making human or automated operational decisions according to business directives or policy statements.</p> <p>Integrations</p> <p>Capability of a BPA tool to integrate with the application landscape of the enterprise.</p> <p>The product is to be able to integrate via the Eskom Architectural approved Integration Bus, (using one of the approved patterns), during the interaction with other Eskom applications. Connectors for branded off-the-shelf applications, such as CRM, ERP, SAP etc., or customized connectors for in-house-built customized applications may also be considered in certain cases.</p> <p>Continuous Intelligence</p> <p>Continuous intelligence is a design pattern in which real-time analytics are integrated into a business operation, processing current and historical data to prescribe actions in response to business moments and other events. It provides decision automation or decision support.</p>

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Scope Item	Description and Deliverable
	<p>Collaboration and Task Management</p> <p>Capability of the BPA tool to enable process stakeholders to collaborate with other stakeholders in support of achieving the desired business outcomes. Collaboration between process stakeholders may be facilitated through a variety of methods, including content-specific events related to annotations, redactions, or creation; real-time chat; case or process instance documents; co-browse sessions; or integration with telephony and video chat services. The platform must have capability to use email notifications.</p> <p>Document Handling</p> <p>Capability of a BPA tool to intelligently handle documents by reading, classifying and routing them to the stakeholders. The solution should also make provision to interact where required with an enterprise document management system (OpenText).</p> <p>Low-Code Workflow Automation</p> <p>Capability of a BPA tool to enable visual design of UI, process models and data models.</p>
<p>Development</p>	<p>Low Code – No Code. development of the existing solutions such as,</p> <ul style="list-style-type: none"> • ACNAC (ACNAC Replacement Project - Direct Customer Major Functional Specification, ACNAC Replacement Project - Direct Customer Minor Functional Specification), and any additional change requests that might be implemented on the platform. • Top 100 (R17640130 -Group IT Technical Specification - BiTop100) • GENTLC (Workflow only) • MBSA (Workflow only) • SET (DEM-02945-X5B8_BRSC_SET system changes_Signed), • IRCAM (IRCAM GIT FRS 042022 Review-signed). • eForm (URS_eForms Portal_Final_Signed, URS_eForms Portal_Final_Signed, and URS_R17322787_eForms Invariable Views_Signed). • All current eForms.

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Scope Item	Description and Deliverable
Configuration	Configure all required functional and non-functional settings in the solution to ensure optimal and secure operations
Data Take On/Migration	<p>Data Migration is seen as part of the scope of the work and considering the complexity and volume of data to be migrated, enough time and resources should be allowed for the data migration.</p> <p>The data migration scope of work needs to address the following:</p> <ul style="list-style-type: none"> • Data Assessment to understand the existing data formats, structures and any potential data quality issues. • Data Mapping and Transformation • Transfer data from the current systems to the new solution without loss or corruption. • Ensure data accuracy, quality and consistency (i.e data integrity) during and after the migration process. • Minimize downtime and business disruption during the migration. • Validate and reconcile migrated data to confirm successful transfer.
Process Updates & Improvements	Updates to existing processes and integration with existing processes & systems (as required) to ensure the solution is robust, extensible and sustainable
Implementation	Implement the solution on all of the stated non-prod & production environments; Deployments into production as required (phased, agile)
Integration	The Tenderer must provide technical resources to build, modify and implement all required interfaces. Refer to the logical design for systems that must integrate to the solution.
	The Integration into the Eskom applications will be done within a phased approach. Integration scope and deliverables is listed below:
	<ul style="list-style-type: none"> • Analyse, design, develop, test, and deploy integration solutions based on the logical design. External interfaces to integrate using Oracle Fusion 12c and IBM WebSphere (Data Power), thus the vendor should be well skilled to work with the mentioned technologies. • The Integration Centre of Excellence (ICOE) governance process must be followed for all approvals. Kindly reference "SOA Workgroup

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Scope Item	Description and Deliverable
	<p>artefacts". All diagrams and processes are to be captured in the Eskom Enterprise Architect (EA).</p> <ul style="list-style-type: none"> • All CIM message artefacts (including Mapping Document) to be placed in the Eskom defined CIM SVN. All code to be placed in Eskom defined Code SVN repository All artefacts to be placed in the Eskom share point.
	<ul style="list-style-type: none"> • Sparx Enterprise Architecture and Altova XMLSpy licences are to be provided by the Vendor for the staff that will be executing the formulation or updating of the Diagrams and Process during the Design
	<p>The following are the integration and Testing activities and artefacts to be produced and presented at the committee for approval and sign off:</p>
	<ul style="list-style-type: none"> • Business test case document. Integration specification document. Mapping Document. • CIM message artefacts including WSDL's and XSD's. • Code and unit testing review. • Deployment Guide. • SIT testing review of results in ALM. SIT test case sign-off. • Performance testing review of results in ALM. • Performance testing sign-off. • Pre-transfer documents for go-live approval. • Test requirements in ALM. • Test cases and results in ALM. • Defects managed in ALM. • Test plan Document. • Non-functional Test plan document. • Test closure reports documents. • Performance test scripts and results.
	<p>Provide an Integration message modeller to complete the following:</p>
	<ul style="list-style-type: none"> • Analysis of message requirements. • Model or update integration message which follow a Common information model. • Create payloads and envelopes.

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Scope Item	Description and Deliverable
	<ul style="list-style-type: none"> • Generate xsd, message model and model dictionary.
	<p>A signed off test closure report is required before a test milestone is completed. The following testing and testing milestones must be completed:</p>
	<ul style="list-style-type: none"> • Unit Testing – test results from the Tenderer’s team. System Integrated Testing, Functionality testing (in QA – end to end functional testing and integration testing. That means testing with other systems and ensuring that all requirements have been successfully configured). This testing must be driven & executed by the Vendor but must include Eskom staff for completeness & authenticity. • Non-Functional Testing (performance testing and disaster recovery testing). This testing must be driven & executed by the Vendor but must include Eskom staff for completeness & authenticity. User Acceptance Testing (Testing by the Eskom customer team that the system is working and meets requirements). This testing must be driven by the Tenderer but must be executed by Eskom staff for completeness & authenticity.
	<p>All testing requirements must cover all identified interfaces that have been identified. The testing team must adhere to the TCoE Turnkey Project Requirements Guideline provided as part of the RFP document.</p>
Testing	<p>Acquire the testing requirements, develop the test cases and conduct testing to ensure that the solution is comprehensively evaluated for implementation in the Eskom IT environment;</p> <p>Complete all testing milestones</p> <p>The testing staff may not be the same staff as the configuration, development and implementation staff assigned to the Project.</p> <p>The following testing milestones must be completed.</p> <ul style="list-style-type: none"> • Unit Testing – test results from the Vendor team

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Scope Item	Description and Deliverable
	<ul style="list-style-type: none"> • System Integrated Testing (in QA – functional testing and integration testing. That means testing with other systems and ensuring that all requirements have been successfully configured). This testing must be driven & executed by the Vendor but must include Eskom staff for completeness & authenticity. • Non-Functional Testing (performance testing and disaster recovery testing). This testing must be driven & executed by the Vendor but must include Eskom staff for completeness & authenticity. • User Acceptance Testing (Testing by the Eskom customer team that the system is working and meets requirements). This testing must be driven by the Vendor but must be executed by Eskom staff for completeness & authenticity.
Security	<p>Refer to the “Web Services Security Standard” Document.</p> <p>Authentication security capability for adminBPAtration, support and management need to use MS AD (Chatbot)/ Azure. Employees can use same org credentials.</p> <p>Role based access mechaBPAm should be adopted.</p>
Human Change & Communication Management	<p>Prepare all internal stakeholders and employees for the adoption of the new solution.</p> <ul style="list-style-type: none"> • Develop the change/communications management strategy & plan and share with key project stakeholders. • Empower and capacitate the change champions & the divisional technical workgroups (change network) with adequate information to successfully drive alignment on the expectations of the project. • Develop communication material (e.g roadmap; stakeholder engagement presentations; training communications; quick reference guides; go-live communications). Should include security awareness training on BPA stated under the Security Scope of work. • Assess the effectiveness of the change/communications management strategy and respond to the issues being raised.

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Scope Item	Description and Deliverable
End User Training	End User Training at all levels as required. Classroom-based and/or web-based training is required. Refer BRS for full requirements.
Eskom Support Staff Training	Support Staff Training. Knowledge transfer of assigned Eskom staff through all stages of the project lifecycle and using a defined skills transfer program. Classroom-based and/or web-based training is also required. Training must be for both Eskom Users and Eskom technical staff. At least two technical resources must be certified on a toolset
Stabilisation	<p>A Pilot site will be established to ensure all bugs and errors are attended to as they arise. This will ensure most of the business scenarios can be experienced in real life.</p> <p>Once the solution is fully implemented in production a six-month stabilisation period is required by the Vendor.</p> <p>During this time Vendor must develop the monthly reports that will be submitted to Eskom reporting on the SLA metrics achieved</p>
Support and Maintenance	<p>Ensure SLA is concluded and includes all SLA metrics / requirements. SLA kicks in during the stabilisation period and thereafter.</p> <p>During this time Vendor must develop the monthly reports that will Monthly reporting of SLA metrics achieved. Contract will be drawn up with penalties for not meeting SLA metrics.</p> <p>SLA to be drawn up such that Eskom reserves the right to terminate the contract and/or apply penalties if service quality levels are repeatedly not met and if issues encountered induce long term service disruptions.</p>
Project Management Activities, Responsibilities & Deliverables as Stipulated.	<p>Deliver project documentation required by the Eskom Group IT Product Delivery. This includes but is not limited to:</p> <ul style="list-style-type: none"> • Detailed integrated schedule for both Phase 1 (Core) and Phase 2 implementations. • Regular update meetings to discuss project progress, address concerns, and ensure alignment with project goals.

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Scope Item	Description and Deliverable
	<ul style="list-style-type: none"> • Weekly progress reports. • Provide information required by Eskom team members to facilitate governance of the project and its deliverables. • Integrate the current application support teams into the project delivery team. • Deliverable Breakdown Structure indicating all fixed cost deliverables with the cost of each deliverable and the total cost of all deliverables. • Payment milestones will be agreed with Vendor at contract time but will be based on completed signed off milestones only which are aligned to agreed baseline schedule (schedule submitted as part of Tender documents will be used as guideline). • Payment schedule forecast and actuals tracking against the forecast. • Delivery Acceptance Certificates with supporting documents. • Project Management documents e.g project management plan, project close-out report.
Change Control	<p>Project change control refers to the changes in project scope, time, and cost. Changes will follow the process below:</p> <ul style="list-style-type: none"> • Changes must be approved by the requester, business owner, project manager, and project sponsor. • Approved changes must be noted in steering committee minutes and scope document must be compiled and signed off. • Depending on the scale of the change, other approvals external to the project may be required. Guidance in this regard will be provided by Eskom. <p>Failure to carry out any of the following will not constitute a scope, time or cost change request.</p> <ul style="list-style-type: none"> • Failure to execute on an instruction that later creates a delay because the instruction was not adhered to • Delays due to poor coordination and planning by the tenderer with internal and/or external Stakeholders.

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Scope Item	Description and Deliverable
	<ul style="list-style-type: none">• Delays due to poor communication by the tenderer with internal and/or external Stakeholders and/or through not involving the correct stakeholders from beginning of the project and/or not getting stakeholder buy in upfront & throughout.• Delays due to the as-is analysis not being properly accomplished.• Delays due to requirements not being understood and correctly implemented.• Delays due to tenderer created rework (for example rework caused by poor quality reviews, and potentially creating a delay)• Delays created by tenderer by not troubleshooting, not identifying root causes and not fixing.• Delays due to non-availability of Eskom key staff as a result of poor tenderer planning.• Delays due to rework because of poor quality or not delivering on all requirements.• Delays to inadequate staffing or non-productive staffing by the tenderer• Delays due to not having segregated development and testing teams.

2.3 Deliverables, Roles and Responsibilities

Vendor to ensure all the requirements are met as per DEM-03372-F6L4_BRSF_ Workflow specific - Intelligent Business Process Management Tool_Revised Template.docx

2.4 Solution Requirements

Refer documents DEM-03372-F6L4_BRSF_ Workflow specific - Intelligent Business Process Management Tool_Revised Template.docx

2.5 Payment Milestones

Payment milestones will be agreed with Vendor at contract time, but will be based on completed signed off milestones only which are aligned to agreed baseline schedule (schedule submitted as part of Tender documents will be used as guideline).

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3 Project Environment

3.1 Eskom Responsibilities

- Defines the governance to be followed. Supports the vendor in achieving agility.
- Overall process management and oversight body. Forms the Steering Committee and supports the Vendor.
- Makes available the Business Requirement Specifications, and Logical Architecture Design
- The approval and signoff authority for all milestones and deliverables
- Provides the VM infrastructure and environments where it is clearly specified that VMs are required and excluded from Vendor's scope.
- Provides access to facilities and workspace as and when required.
- Provides any available as-is documentation and information.
- Provides standards and/or templates that must be adhered to
- Arrange the necessary SHEQ induction session for Vendors working onsite.
- Exclusions: stationery, laptops, plugs, projectors and backups of own works are for the responsibility of the Vendor.
- Provides a Project Manager, Technical Lead(s), Lead Architect, Subject Matter Experts and Support Specialists to the Project to be of support assistance and guidance to the Vendor. The Technical Lead is the central point of contact at Eskom.
- The Eskom Project Manager oversees delivery and is the point of escalation but does not perform the project management expected from the Vendor Project Manager.

3.2 Vendor responsibilities will include the following inclusive of the scope articulated in section 2.2

- The Vendor must ensure sufficiently experienced and skilled staffing to deliver on the project within timelines.

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- The Vendor must ensure that the testing resources are not the same resources as those preparing the designs and developing and implementing the solution. Segregation of duties is required.
- The Vendor must ensure sufficiently experienced and skilled integration staffing (Oracle Fusion middleware) to deliver on the project within Timelines. This is separate from the Business Services layer development, that will also fall within the Vendors responsibility.
- The Vendor is to carry-out thorough analysis for all the requirements, including extensive engagements with Business and Application support teams.
- The Vendor must ensure sufficiently experienced and skilled testing staffing to deliver on the project within Timelines. An experienced test manager must be part of the team.
- The Vendor must provide testing resources with experience in Eskom testing tools ALM and Load runner.
- The Vendor staffs (including Project Manager and Technical Lead(s)) are required to be dedicated to the Project until it is completed.
- The contract with the Vendor will be established with incentives for successful delivery within the approved baseline timelines.
- Delays and/ or non-performance will be addressed using the standard using the standard contractual mechaBPAMs.
- Changes to the baseline schedule must follow the formal project change process (steering committee approval followed by any necessary commercial approval). The necessary commercial modification paperwork must be signed before a change can be considered approved.
- The project must comply with Eskom's governance and successfully complete each required governance milestones. The milestones and deliverables are stated. Refer references list. Eskom together with the Vendor must agree on changes (exceptions) applied for agility. Eskom will support the vendor in this regard.
- Payments are made upon successful completion of a milestone (in accordance with payment milestone that are agreed to and aligned with the approved baseline schedule). Refer references list.

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- Acceptance of a milestone is approval by the relevant Eskom governance committee(s), and/or the Eskom Project Steering Committee.
- The Eskom team assigned to the Project will provide inputs, direction, advice, assistance and oversight as required by the Vendor but execution of the project and delivery of the solution end to end is the responsibility of the Vendor.
- Vendor staff must arrive on site with a valid medical fit to work certificate and a valid driver's licence. No sign on forms will be processed without accompanying medical certificate and drivers licence (in addition to the ID and qualifications required by the sign on form process)
- The Vendor must supply a full time Project Manager and Technical Lead (TL) (single points of contact). Please assign technically knowledgeable, experienced, competent fulltime individuals. Note that Developers with experience of Business Process Automation is key.
- Ensure you adequately staff the team with the correct skills and experience to avoid delay costs.
- The Vendors Project Manager and TL are responsible for co-ordination between all parties involved in the Project.
- The Vendors Project Manager and TL must convene the weekly status meetings with the project team for issue resolution and progress feedback.
- Provide weekly (documented) status reports to Eskom.
- Provide & maintain (availability of) up to date Plans, Schedules Risk and Issue Logs.
- Resource availability: Eskom requires that key resources are 100% dedicated. Staff changes during the project may not exceed 75%. High staff turnover that negatively impacts any aspect of successful solution and/or project delivery will be addressed using the standard contractual mechaBPAMs.
- Vendor staff must come equipped with all the tools to perform the work assigned to the Vendor.
- Adhere to the governance and stage gates in the Eskom's Project Life Cycle Model. Please consult the reference material. Eskom together with the Vendor must agree on changes (exceptions) applied for agility. Eskom will support the vendor in this regard.

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- Ensure the third-party sign-on process are completed timeously and ideally before resources commence work to avoid unnecessary delays. The sign on process takes 3 weeks from the time the forms are submitted. The Vendor must ensure sign on forms are completed properly upfront and are available at the same time as task orders are placed with successful Vendor. The forms will be supplied when the contract is placed.
- Ensure the OHS requirements are adhered to. The details will be communicated when the contract is placed.
- Vendors will provide their own laptops, projectors, white board markers and other stationary as these will not be provided by Eskom. Vendors are responsible for the safe-keeping of their own equipment – these should be locked away when not in use.
- Vendors are responsible for adhering to the Eskom Real Estate rules for the Eskom Site where the Vendor staff will be based.
- Vendors must take regular backups of their work.
- Vendors will do whatever is required to meet the stated baseline schedule/deadlines and bring project back on track if delays are experienced. Vendors are expected to mitigate for risk. A recovery plan is required within 5 days of a missed deadline. Contractual mechaBPAMs will be used to formalise such communications.
- Vendors will schedule own meetings. The providing of agendas, completing attendance registers, and issuing a record of the meetings held with Eskom staff (minutes) are mandatory. Please use your own Project Management templates unless otherwise provided by Eskom.
- Vendors will hold regular meetings with their own staff to monitor progress and communicate requirements. Lack of communication within teams, and poor information dissemination among project team members is a critical point of failure.
- Variations will be dealt with using the standard contractual change management process.
- Vendors must ensure they keep detailed issue logs.
- Development and Testing staffs need to engage and work closely with each other through the full cycle of the delivery. **The testing staff may not be the same staff as the configuration, development and implementation staff assigned to the Project.**

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- Non-performance and/or inability to deliver within the prescribed period will be addressed contractually.
- The Vendor must carry-out their own quality reviews and show proof thereof before any submissions to Eskom takes place.
- The Eskom resources are experienced and understand the environment; we are familiar with common mistakes Vendors make. Take heed of advice that is meant to assist you.
- Failure to carry out any of the following will not constitute a scope, time, or cost change request.
 - Failure to execute on an instruction that later creates a delay because the instruction was not adhered to.
 - Delays due to poor coordination and planning by the Vendor with internal and/or external Stakeholders.
 - Delays due to poor communication by the Vendor with internal and/or external Stakeholders and/or through not involving the correct stakeholders from beginning of the project and/or not getting stakeholder buy in upfront & throughout.
 - Delays due to the as-is analysis not being properly accomplished.
 - Delays due to requirements not being understood and correctly implemented.
 - Delays due to Vendor created rework (for example rework caused by poor quality reviews, and potentially creating a delay)
 - Delays created by Vendor by not troubleshooting, not identifying root causes and not fixing Delays due to non-availability of Eskom key staff as a result of poor Vendor planning.
 - Delays due to rework because of poor quality or not delivering on all requirements.
 - Delays to inadequate staffing or non-productive staffing
 - Delays due to not having segregated development and testing teams.

4 Scope Exclusions

None besides what is stated in BRS.

5 Document Acknowledgement

By signing this document, the people listed record their agreement on the contents of this document.

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Programme / Project Manager:

Name: Sibongile Ndlovu

Signature:



Date:

 16 / 02 / 2024

Enterprise System Support Manager:

Name: Johan Scholtz

Signature:



Date:

 16 / 02 / 2024

Enterprise System Support Middle Manager:

Name: Sizwe Dlamini

Signature:

on behalf of



Date:

 16 / 02 / 2024

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