

MODIFIABLE RFP TEMPLATE & VENDOR Q&A RUBRIC | VNA-RFP-014 | Enterprise ERP, EAM & VMware Modernization

Request for Proposals (RFP): IBM Maximo Lift-and-Shift to OCI & Maximo Application Suite (MAS 9) Upgrade on OpenShift

Instructions for RFP Author: This template is structured so your IT, Architecture, and Procurement teams can issue a rigorous, apples-to-apples Request for Proposals. Customize the bracketed [Modifiable] fields below or use the companion .md file on the solution portal.

1. Issuing Organization & Procurement Schedule (Modifiable Fields)

RFP Field / Milestone	Modifiable Entry / Target Value
Issuing Organization & Sponsor	[Insert Legal Organization Name, Executive Sponsor & Primary Contact Email]
Project Scope Summary	Transition from On-Premises IBM Maximo 7.6.x (WebSphere ND VMs, Oracle / DB2 / SQL Server) & High-Cost Legacy Hosting to Two-Lane OCI Architecture: Lane 1 (Maximo 7.6 Lift-and-Shift on OCI VMs + Oracle 19c/23ai) or Lane 2 (MAS 9 on Red Hat OpenShift + OCI + APEX Companion Portals)
RFP Issue / Q&A; / Proposal Due Dates	[Issue: YYYY-MM-DD] [Vendor Questions Due: +14 Days] [Proposals Due: +30 Days]
Target Contract Type	Fixed-Price Milestone Deliverables with Automated Parity & Cutover Acceptance Gates

2. Mandatory Technical Scope of Work (Modifiable Requirements)

- [REQ-ARCH-01] Pathway 1 - Fast Maximo 7.6 Lift-and-Shift to OCI (6-10 Weeks): We lift your existing Maximo 7.6.1 WebSphere ND application servers, JMS integration queues, and BIRT reporting tiers onto OCI Flexible VMs (`E5.Flex`) while migrating the Maximo database to OCI Base Database / Exadata (19c/23ai) using RMAN Cross-Platform Transportable Tablespace (XTTS) or GoldenGate with near-zero downtime.
- [REQ-ARCH-02] Pathway 2 - Turnkey Upgrade to MAS 9 on Red Hat OpenShift on OCI: When ready for MAS 9, we provision multi-zone Red Hat OpenShift clusters on OCI, uplift legacy Java MBO customizations into upgrade-safe Python/Jython Automation Scripts, run the validated `updatedb` pipeline, and migrate Maximo Anywhere to MAS Mobile.
- [REQ-ARCH-03] Oracle ACE Database Tuning & Multi-Region Disaster Recovery: We tune the `MAXIMO` schema (SQL Plan Baselines, Text Indexes, table partitioning) and configure cross-region Oracle Active Data Guard (`RPO < 5 min`, `RTO < 60 min`) paired with Rackware/Velero application tier replication.
- [REQ-ARCH-04] APEX 24.2 Companion Portals to Cut MAS AppPoint Licensing: Casual requestors, external contractors, and executive dashboard viewers access live Maximo data via an Oracle APEX 24.2 portal connected to Maximo OSLC REST APIs and Active Data Guard read replicas - saving hundreds of thousands in MAS AppPoints.

3. Component Conversion & Acceptance Matrix

Legacy Artifact / Workload	Required Target Architecture	Engineering Method & Acceptance Gate
On-Premises Maximo 7.6.1 WebSphere ND & Admin VMs	Pathway 1: OCI E5.Flex Lift-and-Shift VMs Pathway 2: MAS 9 on Red Hat OpenShift (OCP)	Fast lift-and-shift first or direct Ansible/Operator MAS 9 deployment on OCI
On-Premises Maximo Database (Oracle / SQL Server / Db2)	OCI Oracle Base DB / Exadata 19c/23ai + Active Data Guard	Zero-downtime RMAN XTTS / GoldenGate cutover + MAXIMO schema index tuning
Legacy Java MBO Class Extensions & Custom Workflows	MAS 9 Automation Scripts (Python/Jython) & OSLC Integration Hooks	Preserve 100% in Lift-and-Shift; refactor to upgrade-safe scripts for MAS 9

High-Cost Casual User & Vendor MAS AppPoints	Oracle APEX 24.2 Contractor & Work-Request Companion Portal	Zero-per-seat APEX portal reading Active Data Guard & posting via Maximo OSLC REST
Single-Site Maximo Storage & Manual Backup Scripts	Multi-Region OCI Active Data Guard + Velero / Rackware DR	Automated cross-region failover (US-Ashburn <-> US-Phoenix / US-Chicago)

4. Mandatory Vendor Q&A; Questionnaire & Evaluation Benchmark Key

Bidders must answer each technical question below. Evaluation committee members can compare vendor answers directly against the Reference Benchmark Key:

Vendor Question 1: Is Red Hat OpenShift officially supported and certified to run IBM MAS 9 on Oracle Cloud Infrastructure (OCI)? [Score: ____ / 10]

Reference Evaluation Benchmark: Yes. Red Hat OpenShift Container Platform (OCP) is fully certified and supported on OCI Compute shapes through the joint Red Hat and Oracle strategic partnership, allowing you to colocate MAS 9 OpenShift worker nodes on the same ultra-low-latency VCN subnet as your Oracle Database.

Vendor Question 2: How can Oracle APEX reduce our IBM MAS AppPoint licensing costs? [Score: ____ / 10]

Reference Evaluation Benchmark: External suppliers, invoice submitters, and occasional requestors do not need full MAS Manage seats. By routing vendor submissions and executive read-only dashboards through an Oracle APEX 24.2 portal connected to Maximo REST APIs and Active Data Guard read replicas, you cut AppPoint consumption substantially.

Vendor Question 3: What is included in the downloadable PDF Solution Brief? [Score: ____ / 10]

Reference Evaluation Benchmark: The PDF Solution Brief includes the MAS 9 on OCI + OpenShift Reference Architecture diagram, the Maximo 7.6 `updatedb` pre-flight database tuning checklist, and an OCI vs. AWS/IBM Cloud 5-year TCO model.

Vendor Question 4: How do you rationalize report/query fan-out and guarantee 100% customer code & data ownership? [Score: ____ / 10]

Reference Evaluation Benchmark: Vendor must demonstrate AST SQL clustering to collapse cloned queries into governed core views with runtime/AI-inference filters, and deliver 100% customer-owned SQL, PL/SQL, APEX, or cloud code with zero proprietary runtime lock-in.

5. Commercial Milestone Pricing & Evaluation Weighting (Modifiable)

Phase / Deliverable Gate	Required Acceptance Output	Bidder Fixed Fee	Eval Weight
Phase 0: AST Discovery & Blueprint	Complete code/schema AST inventory, dead-code manifest & core SQL fan-out map	\$ [Insert]	20%
Phase 1: Core Schema & Logic Uplift	Target cloud/DB provisioning, automated DDL/code conversion & unit tests	\$ [Insert]	30%
Phase 2: UI, Reports & UAT	Modernized UI/portals, runtime/AOP reports, security VPD/SSO & UAT sign-off	\$ [Insert]	30%
Phase 3: Cutover & Hypercare	Zero-downtime cutover, row/hash reconciliation & 30-day production warranty	\$ [Insert]	20%