RED BEAR: ENTERPRISE ONTOLOGY MANAGEMENT · DATA SHEET · 5 · ROADMAP AND GOVERNANCE

Roadmaps that converge, partners that are known, and a named person behind every approval

Sequence the work of every entity without merging it, see where two of them are funding the same outcome, bring partners into the picture, and make accountability for convergence explicit.

KEY POINTS

- One transition timeline per entity, built from work packages and their dependencies; nothing is ever scheduled before what it depends on, and a move shows what else moves
- Work packages in different entities that deliver the same capability are flagged as consolidation candidates, with their value and risk side by side
- Partners are onboarded before or after procurement, gathered from configured source classes, compared with the customer's ontology and monitored for change and risk
- Four roles with explicit rights: the administrator never reads content, the manager never writes, the entity architect is scoped to their entity; approvers are named per decision class
- An Entity EA's question about an initiative is answered as an alignment verdict, with evidence and a one-click request to the group team

What it is

Roadmap and governance is the layer of Red Bear: Enterprise Ontology Management that turns the analysis into sequenced, accountable change across the federation. It builds each entity's transition architectures from its work packages and their dependencies, shows the value and risk of each package, and flags where entities in different parts of the group are funding the same outcome. It holds the partners and vendors the entities depend on as entities in their own right, with a structured picture of each and a watch on their risk. And it fixes who may do what: four roles, an approver per decision class, and an audit of every read, write and refusal.

The design follows TOGAF's model for very large federated enterprises, with compliance assessment and dispensation (TOGAF Standard, Applying the ADM §4.3), and one principle of its own: roadmaps are harmonised against shared principles and reference entities, never merged.

The pain point

Every entity has a roadmap, and the roadmaps disagree. Two authorities plan to build the same portal in different years; a shared platform's upgrade is scheduled after the project that depends on it; the group's convergence target is announced and nobody is accountable for it, because nobody can see all the roadmaps at once, and merging them into one plan would strip each entity of the authority it legally holds.

Partners are a second blind spot. A vendor in every entity is a single point of failure the group has never named; a partner under sanctions screening or in the news is a risk that lands on each Managed entity with an active contract, and no one is told. Underneath both sits the question of authority: who may change what, and who approved it.

How it works

Sequence without merging. The timeline of transition architectures is built from the work packages and their dependencies, and the product never schedules a package before one it depends on. Each package shows its position on business value and on risk. Moving a package re-runs the dependency check and shows what else moves as a result. Work packages in different entities that deliver the same capability are flagged as consolidation candidates, and the gap matrix from baseline to target marks every element retained, eliminated or new, with unassigned gaps counted.

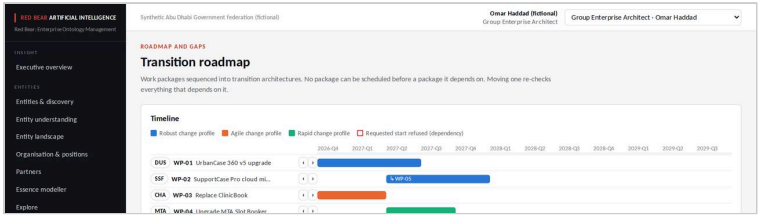
Know the partners. A partner is addable before procurement, as a Baseline or a Partner under evaluation, or after it, with its contracts. Web and news, social and professional networks, credit reference and company registers, and sanctions and adverse-media screening are each a tenant setting with a provider; an unconfigured class is shown as *not configured* and never claimed. The vendor completes the standard questionnaire under the same two-reviewer rules as any intake. The product compares the vendor's ontology with the customer's and proposes suggestions for review in three classes, relationships, integrations and automation opportunities, each with confidence and evidence. A screening match pauses onboarding until a Group EA records a decision. Scheduled checks produce findings in two classes, significant change and risk, each with source, date and confidence, and a risk on a Partner with active contracts raises a risk on every affected Managed entity, visible to its Entity EA.

Name who decides. Four roles carry explicit rights: the System Administrator never reads entity content, the Group Enterprise Manager never writes, the Entity Enterprise Architect is scoped to their entity, and the Group Enterprise Architect owns the shared essence. Sign-in is through the tenant's Entra ID, and an unmapped user sees nothing. The delegated-authority table names, per tenant and decision class, a board or the Group EA role as approver; changing it is a governance decision, and a decision taken under delegation shows the delegating board. Every read of evidence and every write or refused action is logged append-only and exportable. An Entity EA asks whether an initiative, design or change aligns with policy and principles, roadmap and standards, and receives each rated aligned, partly or not, with evidence, risks, ways to align and a one-click request to engage the group team.

What you get

Capability	What it does	Requirements
Transition timeline and consolidation	Work packages sequenced into transition architectures; dependencies never violated; value and risk per package; safe re-planning; packages in different entities delivering the same capability flagged	FR-RM-01 to FR-RM-04
Partner onboarding and monitoring	Before or after procurement; configured source classes, never claimed when unconfigured; the vendor questionnaire; comparison suggestions in three classes; screening that pauses; findings for change and risk, propagated to every affected Managed entity	FR-PN-01 to FR-PN-07
Roles, approvers and audit	Four roles with explicit rights; Entra ID sign-in; an approver per decision class; every read and refusal logged and exportable	FR-RA-01 to FR-RA-04, FR-PL-01, FR-PL-02
Alignment questions and catalogues	An initiative rated against policy, roadmap and standards with evidence and a request to the group team; approved architectures, models and patterns searchable	FR-RA-05, FR-RA-06
Exchange with TOGAF tools	Landscape data imported and exported as tables aligned to the content metamodel	FR-PL-03

Screens



S-05 Gaps & roadmap: Gaps and roadmap: the gap matrix, the work packages on value and risk, and the transition timeline with consolidation candidates across entities flagged. Prototype render on synthetic data for fictional entities.

RETURN ON INVESTMENT

Two measures carry this pillar, both reported by the product and neither carrying a target in this document: **the consolidation candidates found and the duplicated-spend trend by quarter** as they are acted on (FR-RM-04, FR-AN-03); and **the partner findings reviewed within their period**, with the count of Managed entities carrying a propagated partner risk (FR-PN-06, FR-PN-07). What the pillar makes possible is a roadmap review in which two entities discover they are building the same thing before either signs a contract; a schedule that cannot quietly place a project ahead of the platform it needs; a partner risk that reaches each affected entity's architect rather than a procurement file; and a governance record in which every approval, delegation and refusal can be shown to an auditor with the name and role behind it.

Platform engines

Roadmap and governance consumes the Red Bear Platform's Roadmap Harmonisation engine (RBP FR-RH-01 to RBP FR-RH-06), Organisation Information Gathering (RBP FR-OG-03, RBP FR-OG-04), Connectors (RBP FR-CN-04), Identity and tenancy (RBP FR-ID-01, RBP FR-ID-02) and Audit (RBP FR-AU-01, RBP FR-AU-03). Platform behaviour is specified in the platform functional specification, not here.