



CONTRACT 01064

DIGITAL ADVISORY SERVICES

TENDER RESPONSE BOOKLET

**TENDERS ARE TO BE SUBMITTED TO THE
DIGITAL MARKETPLACE PLATFORM BY 3PM
ON WEDNESDAY 25 SEPTEMBER 2024**


Dated

September 2024

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SCHEDULE 1 - TENDER FORM

Name of person, firm or company Tendering (use block letters)	Gartner Australasia Pty Ltd ACN 69 003 708 601
Address	of Level 19, 40 Mount Street North Sydney NSW 2060
	hereby Tenders to perform the work for:
Description of works	Digital Advisory Services
	in accordance with the Gartner Service Description for the Services
	At the rates in the attached Schedules: Schedule 3: Schedule of Rates
If the Tenderer is a company or firm the full names of the individual directors or partners of the company or firm must be stated below	Directors: Karoline Elizabeth Bonacci Lee Michael Davis Mary Gareski
	The Tenderer acknowledges that the information contained in this schedule is true and correct and in preparing this Tender the Tenderer has understood and complied with the Specification for this Tender
Insert date	DATED this <u>02</u> day of <u>October</u> 2024 <div style="border: 1px solid black; padding: 5px; width: fit-content;"> Signed by:  C02A8A4C624F4E7... </div> Signature of Tenderer

SCHEDULE 2 - GENERAL CONTACT INFORMATION

Tenderer's Legal Name:	Gartner Australasia Pty Limited
Tenderer's trading name:	Gartner Australasia Pty Limited
Tenderer's ABN:	69 003 708 601
Tenderer's ACN:	003 708 601
Registered address:	c/o Company Matters Pty Limited Level 12, 680 George Street Sydney NSW 2000 Australia
Postal address:	PO Box 627 North Sydney, NSW 2059, Australia
Telephone No.	+61 2 9459 4600
Fax. No.	
Mobile No.	+61 447 050 479
Contact person:	Thomas Anastakis
Position in company:	Account Executive
Email address:	Thomas.anastakis@gartner.com
Web address (if applicable):	https://www.gartner.com.au/en

SCHEDULE 3 – SCHEDULE OF RATES

The Tenderer will provide a total cost for each item of the services described in the Schedule of Rates. The total cost Tendered for each item shall be inclusive of all costs associated with the entire scope as detailed in Clause 4 of the Tender Brief.

All rates Tendered are to be exclusive of any GST.

Item number	Description	\$Total cost
1	Digital Advisory Service – Year 1	\$130,700.00
2	Digital Advisory Service – Year 2	\$134,700.00
3	Digital Advisory Service – Year 3	\$138,700.00
	TOTAL	\$404,100.00 + GST

Optional Years:

Item number	Description	\$Total cost
1	Digital Advisory Service – Optional Year 4	\$142,800.00
2	Digital Advisory Service – Optional Year 5	\$147,100.00
	TOTAL for Optional Years	\$289,900.00 + GST

Gartner's Tender is the supply of the following subscription-based research and related services:

Service Name/ Level of Access	<u>Service Description URL</u>
Gartner for Midsize Enterprise CIO Plus	http://sd.gartner.com/sd_mse_cio_plus.pdf
IT News and Insight Subscription - IT Team Access	http://sd.gartner.com/sd_it_news_insight.pdf

Gartner's system generated pricing table (which is attached to the draft contract) will be incorporated into the final contract.

Gartner's standard contract term is three (3) years non-cancellable contract. The contract can be extended on an annual basis up to a further two (2) years. Each 12-month extension is a fixed term contract. Services are non-cancellable during the fixed term period.

Notice of intention to extend Term: The Purchaser agrees to give notice promptly (and at least 60 days' notice prior to the expiry of the Term) of its intention to continue the Services for the extension. Notice must be given to DLOMBLeadership@gartner.com.

To purchase Gartner services and secure the quoted price, Wannon Water must accept the terms specified by Gartner relating to Gartner research services, including the requested changes to the terms and conditions of the eServices Register Contract outlined in the

Contract Variables which are specific to the delivery of and use of Gartner research services. Gartner's Tender / Response is contingent upon Wannon Water's acceptance of these terms or negotiation of mutually beneficial terms, ensuring that the contract reflects the agreed-upon terms and conditions. We would be pleased to discuss any questions Wannon Water may have.

SCHEDULE 4 – PROPOSED PAYMENT ARRANGEMENTS

The Tenderer will provide details of their expectations in respect to how they will invoice and be paid for their services under the Contract.

Gartner will invoice Purchaser annually in advance for all Services.

SCHEDULE 5 - ORGANISATIONAL CAPACITY/CAPABILITY

Tenderers are required to demonstrate their capacity and capability to deliver by providing the information requested in this schedule.

The information must be provided for a Tender to be further considered. If necessary, an interview will be arranged between the Tenderer and officers of Wannon Water.

Details provided by the Tenderer shall be treated as confidential.

5.1 Service Scope - Knowledge of and Experience

Provide an explanation of your organisation's knowledge and experience, in particular as it applies to the type of work expected under this Contract, which gives you the ability to carry out the work.

Gartner has been providing research and advisory services for over 45 years to client enterprises worldwide. Gartner provides services to over 15,000 clients in over 100+ countries and now has revenue more than \$5.5B - making Gartner a member of the S&P 500.

[Refer to Appendix 1 - Gartner Fact Sheet for more details into Gartner.](#)

Gartner's expert guidance and tools enable faster, smarter decisions and stronger performance on an organisation's mission-critical priorities.

Currently, Gartner works with many utilities clients in Australia and leading utilities bodies across the world rely on Gartner for global best practice advisory.

Furthermore, in 2024 we fulfilled over 490,000 interactions for clients globally, with a dedicated team of analysts or subject matter experts that specialize in Water Utilities itself.

Gartner delivers Actionable, Objective Insights, developed through rigorous proprietary research methodologies to ensure our insights are independent and objective. These have been created by a global team of 2,500 research and advisory experts who understand your role, business and industry.

Please find below a summary of the Service Scope, in particular as it applies to the type of work expected under this contract, which gives Gartner the ability to carry out the work.

Service Delivery:

Service Delivery team will schedule in regular consult (typically monthly or fortnightly) to understand the organization's current business and technology priority. Based on discussions, specific challenge and desired outcome, Service Delivery team will then coordinate and facilitate the appropriate resources to support delivery. This includes Gartner online material (maturity diagnostics, templates, toolkits, Executive leadership research papers), as well as scheduling in 1:1 calls with the relevant subject matter expert. Account team (Account Executive and Sales Manager) will conduct quarterly strategic account reviews to ensure maximum value delivery, and to review service and support structure on an ongoing basis that is best suited.

Access to advisors to assist in executing business critical priorities:

With Gartner's service model, Wannon Water has access to over 2,500 subject matter experts that are situated across the world (**[reference Appendix 3 – Gartner Expert Examples for more detail](#)**). Subject matter experts or analysts at Gartner have on average 15+ years of experience across hundreds of topic areas in technology. With this service delivery model, Gartner can provide Wannon Water with support across a diverse range of ever-evolving technology priorities. An example being supporting the preparation of tenders and requirements gathering. Gartner will support Wannon Water through the evaluation, documentation and decision of tenders and their requirements through an established end-to-end procurement decision framework 'BuySmart'.

This includes working with the current business and technology teams to understand and determine the needs and demands based on outcomes. This means supporting Wannon Water

through an objective review of the organisations strategic, financial and technical requirements to determine necessary next steps. After supporting Wannon Water to more effectively and efficiently understand the market through vendor and product research (e.g. Magic Quadrant, Peer Insights), Gartner will objectively and independently support Wannon Water with picking the right provider based on business outcomes and needs. With Gartner's established bank of templates, scorecards, checklists, requirements and analyst recommendations, Gartner can aid Wannon Water in the preparation and documentation of tenders that align the deal structures with the business needs, and ensure Wannon Water pick the optimal delivery model, contracting vehicles and pricing models best suited for the organization.

Gartner's dedicated team of Analyst Experts in the Sourcing, Vendor Management and Procurement team or Vendor-specific Analysts will support Wannon Water to also review and optimize spend. Gartner will provide objective guidance to ensure Wannon Water can avoid unnecessary charges, right size support and service levels, as well as benchmark pricing where available.

Additionally, to reduce complexity and risks of vendor proposals, Gartner experts can review T&C's to highlight any unfavourable costs or terms. Gartner currently has over 200+ RFP or equivalent templates ([reference Appendix 4 - Toolkit RFP Template for Selecting a Software Reseller to see example](#)). These templates and tools can be used in conjunction with the advice of Gartner advisors/experts to help save time and streamline the documentation/preparation of tenders and their requirements.

As part of the Gartner partnership, Wannon Water can leverage Gartner's Analysts or Subject Matter Experts on an unlimited/unmetered basis.

In 2024 we fulfilled over 490,000 interactions for clients worldwide - demonstrating our global capability to service a wide array of institutions and provide our utilities clients with best practice advisory and insights. Gartner also has analysts or subject matter experts specialising in utilities - which Wannon Water has previously and can directly consult with as part of the service.

The service model and value comprise of the below:

- 2,500+ analysts available.
- Unlimited analyst access for the client in 30-minute interactions.
- Analysts have an average of 15 years' experience in specific verticals.
- 60% of Analysts have 20+ years IT experience.
- 36% fluent in more than two languages
- Analysts quoted in leading publications (The Times, WSJ, The Economist) on average 70 times per week.

Clients can book time with analysts either through their dedicated Account Executive or themselves via two methods.

- Through the app
- Through Gartner.com

Turnaround time between requesting analyst access and having conversation is typically 24-48 hours.

Wannon Water has access to all global Gartner analysts.

[Refer to Appendix 3 – Gartner Expert Examples for relevant biographies of global experts.](#)

Access to leading industry research and insights

With Gartner's service model, Wannon Water will have unlimited access to industry leading research and insights. Gartner has provided organisations with insights and guidance to client

enterprises globally for over 45+ years. Gartner currently provides best practice guidance to institutions across 100+ countries.

Gartner's portal currently stores over 200,000 research notes based on best in class conducted research by our subject matter experts, to provide users with a single source of market insights, statistics, technology trends and new developments at a global, national, industry and sector levels. Historical notes are archived and refreshed by the analysts on a routine basis and will be adjusted based on industry and market movement. The portal allows a self-service search facility that is always available for the users, across web browser and any mobile device with audio function to support accessibility. Research is categorized across industry and initiatives splits, ranging from Optimization and Modernization to Transformation and Innovation.

Access to proven best practice documents

Wannon Water will have access to proven best practice documents through the fact that Gartner's subject matter experts, advisors and analysts have on average 15+ years' experience, across 1,400 technology and business topics are the key authors of the documents available via the Gartner portal. Additionally, we have Gartner analysts that are specialists in Utilities - with Gartner fulfilling over 490,000 client inquiries in 2024.

Based on Gartner's global footprint and direct service to clients, our analysts have a unique vantage point that enables them to identify patterns and trends, determine best-in-class actions and lessons learnt.

Such enables Gartner's analysts to relay best practice in the documents that they author for clients and to share their observations and opinions based on real-time perspective. (Reference [Appendix 5 – 2024 Power & Utilities Trend Water Companies Accelerate Digitalization Ambition for example of a best practice document written by a Gartner expert with Water utilities expertise](#))

Access to peer benchmarks

Wannon Water will have the ability to access peer benchmarks through Gartner's maturity diagnostics, digital execution scorecard and tools. These allow organizations to benchmark their current environment and position against their global, national, industry and sector peers. Given we have thousands of clients annually taking such assessments to diagnose their current environment, Gartner has thousands of client data points that can be used to help clients benchmark their performance against their peers.

This spans across organization direction, initiatives, technology function and activity maturity, as well as IT budget and efficiency spending, strategic cost optimization, and digital government maturity model. Additional data is obtained across 490,000 client interactions/year, and through annual surveys conducted across multiple executive stakeholders globally such as CEO, CIO, Board of Directors, and more.

Maturity diagnostics and digital execution scorecard provides detailed report into organization posture relative to industry and peers, and what the median result is for specific groups.

Refer to [Appendix 6 - IT Score for Midsize Enterprise CIOs](#) for an example of a maturity diagnostic that allows Wannon Water to access peer benchmarks. To see sample report associated with this diagnostic, please reference [Appendix 6A - IT Score for Midsize Enterprise CIOs - Sample Report](#).

Access to industry networking

Gartner's Peer Connect client community currently has nearly 116,000 active participants from every enterprise function, and the Peer Insights public community has 180,000+ enterprise IT users who have shared more than 380,000 online reviews covering more than 11,600 IT products and services. Service Delivery and Account Management team will also engage and present opportunities to directly link with other local peers that are on a similar digital trajectory to share experiences and learnings. The opportunity to network with peers locally and globally are also present at in-person Summit and Symposium events, and Service Delivery and Account Management team will facilitate those introductions where appropriate.

Refer to Appendix 7 - Peer Community Functionality for more insight into the features and benefits of Peer Community.

Access to decision and diagnostic tools

Gartner's maturity diagnostics, digital execution scorecard and tools allow organizations to support decision making within technology by thoroughly understanding current capability. The functional areas in which clients span across organization direction, initiatives, technology function and activity maturity, as well as IT budget and efficiency spending, strategic cost optimization, and digital government maturity model. By thoroughly understanding current capability with diagnostic tools - Wannon Water can use such tools to make more informed decisions within technology.

Additionally, Gartner also provides Wannon Water with the ability to access a range of tools, templates and guides that can be used to fast-track technology initiatives. These tools, templates and guides are designed to help clients align to best practice, reduce decision risk and save time - when working through initiatives and programs of work. These include a tailored path to maturity based on diagnostic assessments, as well as recommended resources to streamline this process. These assessments are available on an unlimited basis throughout the partnership term, allowing Wannon Water to access and conduct relevant decision and diagnostic tools on a regular basis, and ensure they are on track.

Refer to Appendix 8 - IT Strategy Workbook for insight into the decision templates available to help clients with putting together an IT strategy - which helps to align to best practice and save time.

Access to governance, service management, frameworks, templates, practical tools

Wannon Water will have unlimited access to a range of resources comprising frameworks, templates and practical tools via the Gartner portal. Gartner's portal currently houses 2000+ templates, frameworks, step by step guides and presentation samples that are developed and collated by the subject matter experts based on best practice. This is available to download for the entitled license holder to leverage and is designed to save days to weeks and are designed to support clients with the ability to leverage, contextualize for their organization and review with an analyst to ensure suitable fit. These span from executive-level ready presentations with infographics and talk tracks, to general technology frameworks and toolkits across all domains and fields of technology.

Gartner analysts will frequently review the portfolio of templates, frameworks, toolkits and practical tools to ensure it is actionable, relevant and incorporates the changing landscape of technology. These will be available to Wannon Water through the portal on a self-service basis, however Gartner analysts will also support Wannon Water throughout the development, review and finalization of these resources.

Refer to Appendix 9 IT Key Metrics Data 2024: Industry Measures — Utilities Analysis for examples of frameworks that Wannon Water has access to.

Access to forums

Included as part of the Gartner service, Wannon Water will have the ability to attend an array of virtual and in-person events every year. These events are in the form of webinars, virtual events, virtual briefings, summits, forums and conferences. Gartner hosts 60+ events and webinars each year, including the CIO Forum exclusively and tailored for the senior most IT leaders within an organization, the Data and Analytics Summit, the Security and Risk Management Summit and our flagship event IT Symposium Xpo. These events are conducted globally across EMEA, US, APAC and ANZ, and provide attendees with the opportunity for global professional networking, professional development as well as hearing real life examples and first-hand from clients and experts. Under this agreement, Wannon Water would have access to a VIP ticket to IT Symposium and the CIO Leadership Forum.

Refer to Appendix 10 - CIO Leadership Forum Brochure for insight into an upcoming conference that Wannon Water is entitled to attend (complimentary).

Gartner and Wannon Water have partnered to help drive better decisions, speed up decision making and save technology costs since 2018. In the several years, Gartner has successfully supported Wannon Water to achieve these outcomes.

In 2023/24, some of the highlights of the partnership were:

- Helped to review a cyber security strategy presentation to the board of Wannon Water. the qualitative value of ensuring that the strategy was pitched at the right level and was aligned to what the board needed to see led to positive outcomes in credibility and provided decision confidence to the board that security was a necessary investment and secured buy in. This paved the way for future constructive relationships and discussions with the board as a trusted advisor and driver of business value. It was a first impression on some members of the board, as such it was critical to present in a way that was aligned with their level of strategy. Andrew Jeffers reached out post the presentation and mentioned that it was spot on and delivered strongly. It was instrumental in securing additional OT headcount in the security team. This headcount was able to get over the line in the days following the board presentation.
- Provided maturity assessment of Data and Analytics function, namely, IT Score for Data and Analytics. Providing this assessment represents a consultancy spend avoidance of over \$60,000. Wannon Water's Data and Analytics strategy will be built off the back of the results of the IT Score for Data and Analytics. Bringing in a consultant third party to complete this strategy piece for Wannon Water across the business represents a consultancy spend avoidance of an additional \$100,000.

Some Highlights from Previous Years:

- Microsoft Agreement Negotiation 2020 - \$316,000 saving
- Cyber Security Service Provider Selection 2020 - \$100,000 saving
- Maximo Agreement Negotiation 2020 - \$50,000 saving
- Salesforce Contract Negotiation 2023 - \$50,000 saving

Some Quotes from Gartner Supported Seatholder:

- "The call with Neha was exactly what we were looking for, spot on. We needed thought leadership on this topic as we look to evolve as a business and Neha's ideas will prove very valuable to how Digital is perceived in the org moving forward."
- "When discussing OPEX vs CAPAEX, Chris Ganly Gartner analyst sent reading material around this, definitely will be valuable. There is a real shift between CAPEX and OPEX model license purchasing. This will impact how I will do budgeting."
- "They got some good risk mitigation from the calls with Gartner. The procurement approach was part of discussion. Developing and building the project team, recruitment and defining roles and responsible. There has been a cost avoidance from this, by using consultants to develop a road map – they \$20-\$40K cost avoidance"
- "I am going to sit down with key stakeholders from both information services and from our customer relations teams to run the assessment once more. The digital strategy is already pointing to a need for us to uplift our own maturity in the terms of the data and analytics side"

of the business. We know that with Salesforce coming next year we need to be in a position where the D&A framework at Wannon is ready to accommodate salesforce and drive value. Without Gartner, this assessment would have cost \$50k-60k per, without the ability to repeat and compare.”

- “The Data and Analytics strategy will be built off the back of the results of the IT Score for Data and Analytics, bringing a consultant in to complete this strategy piece for Wannon across the business would have cost upwards of \$100k.”
- “The conversations with the Gartner analyst Zarco and Ethan, really supported our thinking, validating our plan. Although high level and early in the project, it supported our thinking and they helped me articulate our plans to business leaders internally.”

Gartner consistently reviews the success and return-on-investment of the partnership with Wannon Water to ensure we are delivering to expectations and are delivering return on investment on the Gartner partnership. Gartner regularly takes on feedback from Wannon Water in terms of current return on investment and what expectations for success looks like.

Please refer to **Appendix 2 – Wannon Water September QBR** for details of the most recent service review between Wannon Water and Gartner for your reference. The slides are part of a regular delivery cadence where the Gartner account team (Account Executive and Senior Sales Manager) will conduct quarterly strategic account reviews to ensure maximum value delivery, and to review service and support structure on an ongoing basis that is best suited. The attached appendix is the most recent example of one such meeting that Gartner account team has conducted with Wannon Water.

5.2 Staff Resources

Provide brief curriculum vitae for each member of staff you are proposing for the work including details of qualifications, experience and skills.

Name	Thomas Anastakis
Title/Office Held	Account Executive
Qualification	Bachelor's Degree, Business – University of Technology Sydney
Experience	8 years relevant experience, 1 Year with Tenderer Account Executive – Gartner Sales Consultant – PlanRadar Sales Development Representative - Lacework
Role / Function to be performed in relation to the services	Oversee Relationship between Wannon Water and Gartner Review success of partnership through quarterly value reviews – ensuring that Gartner is delivering to expectations Point of contact for account related queries, feedback and account support Support broader Wannon Water with inquiries as required Conduct regular service delivery meetings with seat holder to ensure deep understanding of technology and business priorities Proactively recommend how the Gartner service can add-value to seat holder and Wannon Water Perform service delivery duties as required to support seat holder and organization

Name	Andrew Openshaw
Title/Office Held	Sales Manager
Qualification	
Experience	15 years relevant experience, 4 Year with Tenderer Sales Manager – Gartner Sales Team Leader – Gartner Senior Account Executive – Gartner Senior Consultant – ACRWORLD
Role / Function to be performed in relation to the	Supports oversight of the relationship between Wannon Water and Gartner

services	<p>Available to discuss account feedback and support account conjunction with Account Executive</p> <p>Support in reviewing success of the partnership through quarterly value reviews - ensuring that Gartner is delivering to expectations</p>
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Name	Iain Murray
Title/Office Held	Area Vice President
Qualification	Bachelor of Economics / Bachelor of Commerce, Finance – The Australian National University
Experience	<p>12 years relevant experience, 8 Year with Tenderer</p> <p>Area Vice President – Gartner</p> <p>Senior Sales Manager – Gartner</p> <p>Account Executive – Gartner</p> <p>Relationship Manager – CEB</p>
Role / Function to be performed in relation to the services	<p>Supports oversight of the relationship between Wannon Water and Gartner</p> <p>Responsible to ensure that Gartner service is delivering to expectations</p> <p>Oversees activity of broader account team (Sales Manager and Account executive) to ensure client satisfaction</p> <p>Perform service delivery duties as required to support seat holder and organization</p>

The above profiles represent your Gartner account team. This team will be responsible for day to day management and commercial management of the service going forward.

Due to the nature of our service and the number of analysts available to service Wannon Water, it is unfeasible to include their experience and expertise in this response area. For further details, please refer to appendix below for a summary of example analysts available to service Wannon Water as per the service scope included in Schedule 4.1 and 4.2 of the tender brief. These analysts make up a small sample of over 2,500 available SME's. The analyst body will be providing the advisory and research service as per the service scope.

Refer to Appendix 3 – Gartner Expert Examples for relevant biographies of global experts.

5.3 Key Personnel

Provide a brief description of the names and qualifications of the major personnel who will be directly involved in the provision of this service. Qualifications to include relevant training competencies of licences held **(complete all columns)**.

Name	Resource role	Present position	Responsibilities	Years of experience
Thomas Anastakis	Delivery	Account Executive	Account Management / Service Delivery	8
Andrew Openshaw	Management	Sales Manger	Escalation point / Management	15
Iain Murray	Oversight	Area Vice President	Oversight / Assurance	12
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Alan Waite	Analyst	Managing Vice President	Research and Advisory	38
Craig Lawson	Analyst	VP Analyst	Research and Advisory	33
Richard Addiscott	Analyst	VP Analyst	Research and Advisory	23
Sally Parker	Analyst	Sr Director Analyst	Research and Advisory	32

Ian Bertram	Analyst	Managing Vice President	Research and Advisory	36
Neil Osmond	Analyst	Distinguished VP, Advisory	Research and Advisory	39
Kristian Steenstrup	Analyst	Distinguished VP, Advisory	Research and Advisory	41

5.4 Sub-Consultants

Does the Supplier intend to sub-consult work under the Contract?

YES

NO

☐☒

The Supplier must supply a list of all sub-consultants who will be engaged on a regular or significant basis to perform work under the Contract.

Note: Please also provide sub-consultant's details in Section 5.3, if applicable.

Description of Services to be provided	Subconsultant's Name and Address

SCHEDULE 6 - PAST PERFORMANCE AND CURRENT WORK

a) Service Provision Experience

State the number of years direct experience your organisation has had in the delivery of the type of services required to be performed under this Contract.

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- "When discussing OPEX vs CAPAEX, Chris Ganly Gartner analyst sent reading material around this, definitely will be valuable. The is a real shift between CAPEX and OPEX model license purchasing. This will impact how I will do budgeting."

- "They got some good risk mitigation from the calls with Gartner. The procurement approach was part of discussion. Developing and building the project team, recruitment and defining roles and responsible. There has been a cost avoidance from this, by using consultants to develop a road map – they \$20-\$40K cost avoidance"
- "I am going to sit down with key stakeholders from both information services and from our customer relations teams to run the assessment once more. The digital strategy is already pointing to a need for us to uplift our own maturity in the terms of the data and analytics side of the business. We know that with Salesforce coming next year we need to be in a position where the D&A framework at Wannon is ready to accommodate salesforce and drive value. Without Gartner, this assessment would have cost \$50k-60k per, without the ability to repeat and compare."
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- "The conversations with the Gartner analyst Zarco and Ethan, really supported our thinking, validating our plan. Although high level and early in the project, it supported our thinking and they helped me articulate our plans to business leaders internally."

Gartner consistently reviews the success and return-on-investment of the partnership with Wannon Water to ensure we are delivering to expectations and are delivering return on investment on the Gartner partnership. Gartner regularly takes on feedback from Wannon Water in terms of current return on investment and what expectations for success looks like.

As Gartner works with organisations on their most critical priorities, non-disclosure agreements are in place. As such, Gartner is unable to list names, service descriptions, contract lengths or approximate contract values of clients, as below, without their express permission.

List current and past experience, which would be directly applicable to the work to be performed under this contract (all columns should be completed). Please add separate documentation if there is insufficient space on this schedule.

Client Name	Overview of Contract – Service Description, Contract Length, Approximate Contract Value
<u>Current works</u>	Gartner has extensive experience in delivering high-quality research and advisory across various industries. Our proven methodologies and industry insights ensure that we can effectively meet the requirements of this contract. While we are unable to disclose specific current and past projects due to confidentiality, we can assure you that our team has successfully completed numerous engagements similar in scope and complexity to the work required under this contract. Our commitment to maintaining client confidentiality underscores our professionalism and the trust our clients place in us.

<u>Previous works</u>	As above.
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b) Referees

Please provide referees that Wannon Water can contact about the services offered, and the services required under the Tender.

Client and contact details:

TAS Water – Jon Ettershank, Head of Digital and Technology -
jon.ettershank@taswater.com.au

Description of service:

Research and Advisory

Period:

March 2021 – Present

Client and contact details:

Barwon Water – Wayne Pales, GM Digital business -
Wayne.Pales@barwonwater.vic.gov.au

Description of service:

Research and Advisory

Period:

Nov 2022 – Present

Client and contact details:

Hunter Water - Jenny Francis, Executive Manager, Digital -
jenny.francis@hunterwater.com.au

Description of service:

Research and Advisory

Period:

June 2022 – Present

SCHEDULE 7 - PROPOSED METHODOLOGY AND APPROACH

Please provide an outline of your proposed methodology and approach.

Account team will schedule in regular consult (typically monthly) to understand the organization's current business and technology priority. Based on discussions, specific challenge and desired outcome, Service Delivery team will then coordinate and facilitate the appropriate resources to support delivery. This includes Gartner online material (maturity diagnostics, templates, toolkits, Executive leadership research papers), as well as scheduling in 1:1 calls with the relevant subject matter expert. Account team (Account Executive and Sales Manager) will conduct quarterly strategic account reviews to ensure maximum value delivery, and to review service and support structure on an ongoing basis that is best suited.

The Gartner methodology and approach as described in schedule 7 can be illustrated across 5 key pillars of value as below;

Analysts:

As part of the Gartner partnership, Wannon Water can leverage Gartner's Analysts or Subject Matter Experts on an unlimited/unmetered basis.

In 2024 we fulfilled over 490,000 interactions for clients worldwide - demonstrating our global capability to service a wide array of institutions and provide our utilities clients with best practice advisory and insights. Gartner also has analysts or subject matter experts specialising in utilities - which Wannon Water has previously and can directly consult with as part of the service.

The service model and value comprise of the below:

- 2,500+ analysts available.
- Unlimited analyst access for the client in 30-minute Interactions.
- Analysts have an average of 15 years' experience in specific verticals.
- 60% of Analysts have 20+ years IT experience.
- 36% fluent in more than two languages
- Analysts quoted in leading publications (The Times, WSJ, The Economist) on average 70 times per week.

Clients can book time with analysts either through their dedicated Account Executive or themselves via two methods.

- Through the app
- Through Gartner.com

Turnaround time between requesting analyst access and having conversation is typically 24-48 hours.

Wannon Water has access to all global Gartner analysts.

Contract and Document Reviews:

As part of the Gartner partnership, Wannon Water can leverage Gartner's Analysts or Subject Matter Experts to support the review of strategic documents and contracts on an unlimited basis.

Every year, Gartner reviews ~11,000 contracts on behalf of clients and ~20,000 strategic documents.

For documentation reviews analysts are blocked out an hour in their calendar the day prior / morning prior to the call with the client to full prep for conversation. A 30-minute slot is then reserved for walking the client through the reviewed information.

Gartner finds hard dollar savings on approximately 75% of contracts reviewed.

Refer to Appendix 11 - Contract Review Case Study and ROI for further client example as to how Gartner helped another client save \$7M with the same contract review service that Wannon Water has access to.

With Gartner's service model, Wannon Water has access to over 2,500 subject matter experts that are situated across the world ([reference Appendix 3 – Gartner Expert Examples for more detail](#)). Subject matter experts or analysts at Gartner have over 15+ years of experience across hundreds of topic areas in technology. With this service delivery model, Gartner can provide Wannon Water with support across a diverse range of ever-evolving technology priorities. An example being supporting the preparation of tenders and requirements gathering. Gartner will support Wannon Water through the evaluation, documentation and decision of tenders and their requirements through an established end-to-end procurement decision framework 'BuySmart'.

This includes working with the current business and technology teams to understand and determine the needs and demands based on outcomes. This means supporting Wannon Water through an objective review of the organisations strategic, financial and technical requirements to determine necessary next steps. After supporting Wannon Water to more effectively and efficiently understand the market through vendor and product research (e.g. Magic Quadrant, Peer Insights), Gartner will objectively and independently support Wannon Water with picking the right provider based on business outcomes and needs. With Gartner's established bank of templates, scorecards, checklists, requirements and analyst recommendations, Gartner can aid Wannon Water in the preparation and documentation of tenders that align the deal structures with the business needs, and ensure Wannon Water pick the optimal delivery model, contracting vehicles and pricing models best suited for the organization.

Gartner's dedicated team of Analyst Experts in the Sourcing, Vendor Management and Procurement team or Vendor-specific Analysts will support Wannon Water to also review and optimize spend. Gartner will provide objective guidance to ensure Wannon Water can avoid unnecessary charges, right size support and service levels, as well as benchmark pricing where available.

Additionally, to reduce complexity and risks of vendor proposals, Gartner experts can review T&C's to highlight any unfavourable costs or terms. Gartner currently has over 200+ RFP or equivalent templates ([reference Appendix 4 - Toolkit RFP Template for Selecting a Software Reseller to see example](#)). These templates and tools can be used in conjunction with the advice of Gartner advisors/experts to help save time and streamline the documentation/preparation of tenders and their requirements.

Gartner Portal:

With Gartner's service model, Wannon Water will have unlimited access to industry leading research and insights. Gartner has provided organisations with insights and guidance to client enterprises globally for over 45+ years. Gartner currently provides best practice guidance to institutions across 100+ countries. Gartner's portal currently stores over 200,000 research notes based on best in class conducted research by our subject matter experts, to provide users with a single source for market insights, statistics, technology trends and new developments at a global, national, industry and sector levels. Historical notes are archived and refreshed by the analysts on a routine basis and will be adjusted based on industry and market movement. The portal allows a self-service search facility that is always available for the users, across web browser and any mobile device with audio function to support accessibility. Research is categorized across industry and initiatives splits, ranging from Optimization and Modernization to Transformation and Innovation.

Wannon Water will have access to proven best practice documents through the fact that Gartner's subject matter experts, advisors and analysts have on average 15+ years' experience, across 1,400 technology and business topics are the key authors of the documents available via the Gartner portal.

Based on Gartner's global footprint and direct service to clients, our analysts have a unique vantage point that enables them to identify patterns and trends, determine best-in-class actions and lessons learnt. Such enables Gartner's analysts to relay best practice in the documents that they author for clients and to share their observations and opinions based on real-time perspective. ([Reference Appendix 5 - 2024 Power & Utilities Trend Water Companies Accelerate Digitalization Ambition for example of a best practice document written by a Gartner expert with utilities expertise](#))

Gartner's maturity diagnostics, digital execution scorecard and tools allow organizations to support decision making within technology by thoroughly understanding current capability. The functional areas in which clients span across organization direction, initiatives, technology function and activity maturity, as

well as IT budget and efficiency spending, strategic cost optimization, and digital maturity model. By thoroughly understanding current capability with diagnostic tools – Wannon Water can use such tools to make more informed decisions within technology.

Additionally, Gartner also provides Wannon Water with the ability to access a range of tools, templates and guides that can be used to fast-track technology initiatives. These tools, templates and guides are designed to help clients align to best practice, reduce decision risk and save time - when working through initiatives and programs of work. These include a tailored path to maturity based on diagnostic assessments, as well as recommended resources to streamline this process. These assessments are available on an unlimited basis throughout the partnership term, allowing Wannon Water to access and conduct relevant decision and diagnostic tools on a regular basis, and ensure they are on track.

Refer to Appendix 8 - IT Strategy Workbook for insight into the decision templates available to help clients with putting together an IT strategy - which helps to align to best practice and save time.

Wannon Water will have unlimited access to a range of resources comprising frameworks, templates and practical tools via the Gartner portal. Gartner's portal currently houses 2000+ templates, frameworks, step by step guides and presentation samples that are developed and collated by the subject matter experts based on best practice. This is available to download for the entitled license holder to leverage and is designed to save days to weeks and are designed to support clients with the ability to leverage, contextualize for their organization and review with an analyst to ensure suitable fit. These span from executive-level ready presentations with infographics and talk tracks, to general technology frameworks and toolkits across all domains and fields of technology.

Gartner analysts will frequently review the portfolio of templates, frameworks, toolkits and practical tools to ensure to ensure it is actionable, relevant and incorporates the changing landscape of technology. These will be available to Wannon Water through the portal on a self-service basis, however Gartner analysts will also support Wannon Water throughout the development, review and finalization of these resources.

Refer to Appendix 9 - IT Key Metrics Data 2024 Industry Measures — Utilities Analysis for examples of frameworks that Wannon Water has access to.

Peer Connect and Events:

Gartner's Peer Connect client community currently has nearly 116,000 active participants from every enterprise function, and the Peer Insights public community has 180,000+ enterprise IT users who have shared more than 380,000 online reviews covering more than 11,600 IT products and services. Service Delivery and Account Management team will also engage and present opportunities to directly link with other local peers that are on a similar digital trajectory to share experiences and learnings. The opportunity to network with peers locally and globally are also present at in-person Summit and Symposium events, and Service Delivery and Account Management team will facilitate those introductions where appropriate.

Refer to Appendix 7 - Peer Community Functionality for more insight into the features and benefits of Peer Community.

Included as part of the Gartner service, Wannon Water will have the ability to attend an array of virtual and in-person events every year. These events are in the form of webinars, virtual events, virtual briefings, summits, forums and conferences. Gartner hosts 60+ events and webinars each year, including the CIO Forum exclusively and tailored for the senior most IT leaders within an organization, the Data and Analytics Summit, the Security and Risk Management Summit and our flagship event IT Symposium Xpo. These events are conducted globally across EMEA, US, APAC and ANZ, and provide attendees with the opportunity for global professional networking, professional development as well as hearing real life examples and first-hand from clients and experts.

Refer to Appendix 10 - CIO Leadership Forum Brochure for insight into an upcoming conference that Wannon Water is entitled to attend (complimentary).

As a Gartner client, Wannon Water will be entitled to attend virtual events, briefings and webinars which are included as part of the partnership.

Virtual events, briefings and webinars are virtual events that are periodically hosted by Gartner experts which enable clients to learn and participate in first-hand presentations and discussions. Such provides client organisations with the ability to access the latest insights from our experts first-hand, participate in live discussions with peers (where applicable) and network with other client organisations (where applicable).

When these events are scheduled, Wannon Water has and will receive invitations from the service delivery team and account team to register attendance.

These virtual events often range in topic and target audience and as such, the service delivery team and account team will be able to recommend key events and their benefits to varying stakeholders at Wannon Water.

An example of a virtual event that Wannon Water is entitled to attend is Virtual Briefing: How Midsize CIOs Can Align IT Narratives With C-Suite Expectations ([Appendix 12 - Virtual Briefing 2024](#))

This event is targeted at CIOs and is designed to help CIOs better align with the C-suite. Usually, these events can be from 30-90 minutes long. Once Wannon Water registers for an event like this, a confirmation and calendar invite will be sent for the session.

As part of the Gartner partnership, Wannon Water will have the ability to attend select in-person conferences.

Wannon Water is currently able to attend two in-person conferences every year: CIO Leadership Forum and Gartner IT Symposium. Conferences give clients the ability to immerse in multi-day events - such events consist of learning from Gartner analysts/subject matter experts through 1:1 conversations, live roundtables and presentations.

Additionally, conferences enable clients to network amongst one-another, giving Wannon Water attendees the opportunity to learn from peers and grow professional networks. Lastly, conferences consist of technology vendor presentations and exhibitions - allowing Wannon Water attendees to hear from varying vendors and stay abreast of new technology services, products and solutions.

Maturity Assessments, Benchmarks and Roadmaps:

Wannon Water will have the ability to access peer benchmarks through Gartner's maturity diagnostics, digital execution scorecard and tools. These allow organizations to benchmark their current environment and position against their global, national, industry and sector peers. Given we have thousands of clients annually taking such assessments to diagnose their current environment, Gartner has thousands of client data points that can be used to help clients benchmark their performance against their peers.

This spans across organization direction, initiatives, technology function and activity maturity, as well as IT budget and efficiency spending, strategic cost optimization, and digital government maturity model. Additional data is obtained across 490,000 client interactions/year, and through annual surveys conducted across multiple executive stakeholders globally such as CEO, CIO, Board of Directors, and more.

Maturity diagnostics and digital execution scorecard provides detailed report into organization posture relative to industry and peers, and what the median result is for specific groups.

[Refer to Appendix 6 - IT Score for Midsize Enterprise CIOs for an example of a maturity diagnostic that allows Wannon Water to access peer benchmarks. To see sample report associated with this diagnostic, please reference Appendix 6A - IT Score for Midsize Enterprise CIOs - Sample Report.](#)

For further information into the proposed Gartner methodology and specific examples as they pertain to schedule 4.0 of the tender brief, [reference Appendix 3 – Gartner Expert Examples](#) and [Appendix 13 – Gartner Research Notes Examples](#)

SCHEDULE 8 – EXTRA SERVICE AVAILABILITY

Please provide details of extra services that are able to be competently delivered by your Company that align to but are not directly listed within the Specification Scope. Tenderers should include all details inclusive of proposed costing to provide the service. These services may be considered by Wannon Water in assessing tender proposals.

Gartner Executive Programs

An additional service that is available from Gartner is Executive Programs. Executive Program service would provide Wannon Water with the following:

Assigned Service Delivery Team:

An Executive Programs CIO expert, who works with CIOs every day, and an Executive Client Manager will serve as the Member's primary point of contacts.

The Executive Programs CIO expert will facilitate the identification and leverage of targeted Gartner offerings to meet the organizations initiatives and priorities in Wannon Water's context.

The Member may interact via teleconference monthly with the CIO expert and Gartner to ensure ongoing engagement and delivery of value. Interactions may include research advisor interactions, local events, Symposium attendance, peer networking interactions, or teleconferences with the Service Delivery Team to include the review and application of Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content.

Executive Programs Reports:

These reports cover Gartner-selected topics, such as IT governance, business value of IT, architecture and other areas where business and IT intersect. Includes associated tools and teleconferences hosted by Executive Programs report authors to discuss their research.

Identify opportunities and solve your most pressing issues with an aligned Executive Partner who understands your initiatives and acts as your sounding board, mentor and coach.

The Executive Programs service will allow Wannon Water to reduce risk, accelerate delivery, save time and money, improve the capabilities of the team and leverage global best practice across technology.

This additional service level carries a year 1 cost of \$200,700 AUD. Representing a \$70,000 uplift per annum from the current arrangement.

SCHEDULE 9 – INSURANCE DECLARATION

I declare that the following insurances are held and are maintained current by the Tenderer's company:

- a) **Worker's Compensation Insurance (WorkCover)** covering all persons employed by me.

WorkCover employer no.	5143056
Location	Victoria
Claims administration agent:	EML VIC Pty Ltd
Address:	GPO Box 4695 Melbourne VIC 3001

- b) A **Public and Products Liability** Policy for an amount of not less than \$20 million against all risks associated with accident to the public.

Insurer	Aon Risk Services Northeast, Inc.
Policy no.	800280116

- c) A **Professional Indemnity Insurance** Policy for an amount of not less than \$5 million against all risks associated with delivery of professional advice.

Insurer	Aon Risk Services Northeast, Inc.
Policy no.	013572106

PLEASE PROVIDE COPIES OF CERTIFICATES OF CURRENCY ISSUED BY YOUR INSURER FOR ALL INSURANCES IN THIS SCHEDULE TO SHOW THAT ALL PAYMENTS ARE UP TO DATE.

NOTE: It is the responsibility of the Tenderer to ensure that any sub-consultants to perform works under this consultancy shall also have in place adequate current insurances. Details of such insurances and copies of current Certificates of Currency shall be included as part of the submission.

SCHEDULE 10 – PERFORMANCE STANDARDS

Are the performance standards as outlined able to be achieved?

CRITERIA	MEASURE	PERFORMANCE TARGET	YES	NO
Account meetings	Regular account meetings to ensure value is received from the service	Monthly account meetings of at least one hour in which the client can express the value received by the service and the provider can provide suggestions to better utilise the service, based on an understanding of Wannon Water's strategic objectives.	x	
Client Satisfaction	Feedback requested at monthly account meetings Feedback requested following calls with analysts	A rating of Satisfied or Very Satisfied.	x	
Continuous improvement	The vendor shall have a mechanism to incorporate client feedback into the service	Evidence that feedback has been incorporated.	x	
Technical	Information provided can be relied upon for its technical robustness	Solutions and recommendations must align with industry best practices and comply with any relevant regulations and standards	x	
Accuracy and Completeness	Information provided can be relied upon for its accuracy and completeness	All deliverables must be accurate, comprehensive, and meet the agreed-upon scope and requirements.	x	
Information Standards	Easily consumed artifacts	All provided information must be clear, well-organised, and	x	

		follow a specified format.		
Data Security	All work shall comply with Wannon Water's data security policies, including the handling of sensitive information	Compliance achieved	x	
Privacy Compliance	The provider shall adhere to relevant data protection and privacy regulations (VPDSS, Wannon Waters Privacy Procedure)	Adherence achieved	x	
Responsiveness	The provider shall respond to client inquiries and communications in a timely fashion	Responses within 24 business hours from receipt of the request by the Provider.	x	

If Performance Standards are unable to be met, explain why.

Privacy Compliance - Gartner will not have access to Wannon Water customer information therefore the *Privacy and Data Protection Act 2014* (VIC) and Wannon Waters Privacy Procedure are not applicable under the proposed contract. Gartner will comply with the Australian Privacy Principles in the *Privacy Act 1988* (Cth) and the Gartner Privacy Policy. Gartner does not review client-specific policies in delivery of Services.

SCHEDULE 11 – TRANSITION PLAN

Please detail your process of contract implementation in the form of a Transition Plan to facilitate the effective implementation at the Commencement Date.

The plan must include the necessary time frames to ensure a smooth transition.

Also, please detail all data and records and other information relating to the operation of the Contract that will be handed over to the Wannon Water at the completion of the Contract, if applicable.

Gartner is not performing Managed Services, Maintenance and Support Services or Hardware Services, which ordinarily necessitates a Transition In Plan in accordance with the requirements of the eServices Register Contract. However, Gartner will undertake the following activities to facilitate seamless onboarding from the commencement date.

Service Kick Off:

Upon execution of contract, Wannon Water representative and supported seatholder will meet with the Gartner Account Team (Account Executive, Sales Manager) to facilitate a service kick off meeting. This 1 hour meet will ensure understanding of all facets and features of the service that are available to Wannon Water. This session will also be used to uncover and record all of the critical business and technology objectives of Wannon Water to tailor and customize the service to best suit the needs of Wannon Water. This meeting will cover the value that Wannon Water expects to receive, what metrics will be used to measure success and any other matters pertaining to the effective delivery of the Gartner service. This time will also be utilized to develop immediate next steps and set expectations of value from the partnership.

Login Details:

Following Service kick off meeting, Wannon Water will receive email correspondence containing login details for the Gartner portal. All Gartner service agreements begin on the 1st day of any given month. These login details will be used across the entire Gartner service, from research portal login, to events registration and peer connect opportunities.

Platform Walkthrough:

A member of the Gartner onboarding team will set up time with Wannon Water to perform a platform walkthrough and customized portal experience. The purpose of this meeting is to cover all of the particulars of usage in our portal, as well as customizing the suggested reading to be aligned with Wannon Water's technology and industry priorities.

Ongoing Delivery Cadence:

Gartner Account Team will schedule in regular consult (typically monthly) to understand the organization's current business and technology priority. Based on discussions, specific challenge and desired outcome, Service Delivery team will then coordinate and facilitate the appropriate resources to support delivery. This includes Gartner online material (maturity diagnostics, templates, toolkits, Executive leadership research papers), as well as scheduling in 1:1 calls with the relevant subject matter expert. Account team (Account Executive and Senior Sales Manager) will conduct quarterly

strategic account reviews to ensure maximum value delivery, and to review service and support structure on an ongoing basis that is best suited.

SCHEDULE 12 – COMPLIANCE WITH CONDITIONS OF CONTRACT

The Tenderer is to signify whether or not its Tender conforms to the requirements of the **eServices Conditions of Contract** and the **Tender Response Booklet**.

The Tenderer confirms that the **eServices Conditions of Contract** included within the Tender Pack are accepted.

YES NO

☐ ☒

This Tender conforms to the requirements of the Tender conforms to the requirements of the Tender Brief and the Tender Response Booklet.

YES NO

☒ ☐

Should the Tenderer answer No to either statement above, the Tenderer shall list below all areas of non-conformance or proposed amendments and the reasons for such non-conformance.

[Drafting note: Gartner has reviewed the draft contract and prepared a marked-up version with requested changes, visible in track changes. Please refer to the *Contract 01064 – Digital Advisory Services – eServices Register Contract Gartner Response* (“Contract Variables”) attached to Gartner’s Tender. The Contract Variables include Gartner’s service-specific and licence terms, tailored to the sale and use of Gartner services, and largely align with the terms previously agreed upon by Wannon Water.]

Applicable Clause No.	Area of Non-Conformance and Reason
Contract Variables	
Item 1	Commencement Date and Completion Date: The contract specifies a fixed term of 3 years from 1 May 2025 to 30 April 2028.
Item 2	Term: The contract can be extended on an annual basis up to a further two years. Each 12-month extension is a fixed term contract. Notice of intention to extend must be given at least 60 days prior to the expiry of the Term.
Item 3	The Services to be provided are as described in Annexure C to Schedule 1 – Services and Deliverables.
Item 4	Gartner will undertake the onboarding activities to facilitate seamless onboarding from the commencement date, which is more aligned with the nature of Gartner services.
Item 10	Service Levels: Not applicable. <u>Reason:</u> Gartner research contracts do not include a service level regime. Analyst inquiries are subject to availability of individual

Applicable Clause No.	Area of Non-Conformance and Reason
	research and advisory experts. Any service-level time scales provided to Gartner is noted and serve as a guide and intended to help the parties manage expectations, facilitate communication between the parties and enable the evaluation of improvement of service delivery. Gartner will endeavour to meet client requests within these guidelines.
Item 11	Service Level Reports: Not applicable.
Item 13	Fees and Invoicing: Gartner research contracts are fixed term agreements with no termination for convenience provisions.
Item 14	Records: Supplier must maintain accounts and records, but nothing requires the Supplier to provide access to confidential documents or records.
Item 16	Intellectual Property Rights: Rights in Deliverables created by the Supplier will be owned by the Supplier. The Gartner Usage Policy is the "baseline licence" and explains how a licensed user/seat holder can use and leverage Gartner Research. <u>Reason:</u> This is Gartner's licence terms which applies to all subscribers of our research services.
Item 25	Limitation of liability: Liability cap is equivalent to one time the Fees paid for the relevant Service. The Purchaser agrees that the Services are provided on an "as is" basis and Gartner disclaims all warranties. Gartner will not be liable for any actions or decisions that the Purchaser may take based on the Services or any information or data contained therein. <u>Reason:</u> Gartner Research is Gartner's research and analysis and is provided on an as is basis without warranty of fitness for purpose, etc. It is one of many tools in the Licensed User's toolbox to use in building their knowledge and foundation for any department or corporate strategy policies and initiatives. It is up to our clients to perform their own due diligence as to whether the information or opinion in the services is appropriate for the client to take any action on. For this reason, Gartner research contracts do not include indemnities for the benefit of clients.
Item 33	Approved Subcontractors: Gartner's parent company, Gartner Inc., or its subsidiaries contribute to the delivery of, or provide access to the research services.
Item 36	Professional Services: Clause 2.2.3 of Schedule 7 to the eServices Register Contract is modified to align with the relevant Gartner Service Description. Clause 2.2.4 of Schedule 7 to the eServices Register Contract is not applicable. <u>Reason:</u> Gartner Research is Gartner's research and analysis and is provided on an as is basis without warranty of fitness for purpose, etc. It is one of many tools in the Licensed User's toolbox to use in building

Applicable Clause No.	Area of Non-Conformance and Reason
	their knowledge and foundation for any department or corporate strategy policies and initiatives.
Item 37	Transition Out: Not applicable.
Annexure A to Schedule 1 Contract Variables (Fees and Invoicing)	Gartner has incorporated its system-generated order schedule. Gartner will invoice Purchaser annually in advance for all Services.
Annexure C to Schedule 1: Contract Variables (Services and Deliverables)	Gartner has reviewed Wannon Water's requirements outlined in the Tender Brief (Annexure B to Schedule 1: Contract Variables) and has provided specific details about its delivery model and key considerations for performing the services.
Schedule 3 – Statement of Work	Not applicable. The Services are specified in Annexure A to Schedule 1 Contract Variables, and specific details about Gartner's delivery model and key considerations for performing the services are specified in Annexure C to Schedule 1: Contract Variables.

SCHEDULE 13 – CONFLICT OF INTEREST

I/We

In making this Tender submission, have considered the implications of making this submission or of providing the services which are the subject of this Tender and:

~~Either:~~

(Cross out whichever is not applicable)

- a) Have satisfied ourselves that no relationships exist between this company and any other company, body, association or like organisation or any individual or group of individuals who might have an interest in the subject of this Tender.

~~OR~~

- b) ~~Have identified the following relationships which might be considered as possible conflicts of interest:~~

In the event of such relationships arising in the course of preparing a submission or after having presented a submission, the parties will immediately inform the Responsible Officer who may take such action as necessary to ensure that the outcome of the Tender process is not compromised.

Tenderer Gartner Australasia Pty Ltd ACN 69 003 708 601

Signature	Signed by:	Date	September 30, 2024
	 C02A8A4C624F4E7...		

SCHEDULE 14 – SAFE & FAIR WORKPLACES

Corporate governance aligning with social procurement – Supporting safe and fair workplaces

Assurance Statement

I/We

Gartner Australasia Pty Ltd ACN 69 003 708 601

In making this tender submission, provide assurance that I/We have in place operational processes that ensure compliance to the following categories and relevant legislation:

- Commonwealth workplace relations legislation (including the *Fair Work Act 2009* (Cth)).
- A family violence leave policy that meets National Employment Standards (including access to paid leave).
- Long service leave (including the *Long Service Leave Act 2018* (Vic) and the *Long Service Leave Portability Act 2018* (Vic)).
- Wage theft (including the *Wage Theft Act 2020* (Vic)).
- Worker's compensation (including the *Workplace Injury Rehabilitation and Compensation Act 2013* (Vic)).
- Equal opportunity (including the *Equal Opportunity Act 2010* (Vic)).
- Workplace gender equality (including the *Workplace Gender Equality Act 2012* (Cth)).
- Anti-discrimination (including the *Age Discrimination Act 2004* (Cth), *Sex Discrimination Act 1984* (Cth), *Racial Discrimination Act 1975* (Cth) and the *Disability Discrimination Act 1992* (Cth)).
- Superannuation (including the *Superannuation Guarantee Administration Act 1992* (Cth)).
- Labour Hire Licensing (including the *Labour Hire Licensing Act 2018* (Vic)).
- Child employment (including the *Child Employment Act 2003* (Vic)).

Please list those above where compliance is **not** met within your operational processes and detailed reasons why below:

Tenderer Name:

Gartner Australasia Pty Ltd ACN 69 003 708 601

Signature:

Signed by:
Mary Gareski
C02A8A4C624F4E7...

Date:

September 30, 2024

Baseline Assessment Questions	Yes	No	Provide an explanation/additional information/evidence
1. Does your organisation only employ employees in accordance with an enterprise agreement approved by the Fair Work Commission, modern award or employment contract?	X	<input type="checkbox"/>	Instruction: If 'No', briefly explain the reason/s for this response and any other employment arrangements your organisation has in place:
2. Does your organisation have policies/procedures that allow employees to access information about the relevant enterprise agreement or modern award or ensure that employees are provided with a copy of their employment contract?	X	<input type="checkbox"/>	Instruction: If 'No', briefly explain <ul style="list-style-type: none"> the reason/s for this response; and whether your organisation is currently taking steps to implement a policy/procedure to allow employees to access this information or obtain a copy of their employment contract (including implementation process and timeline).
3. Does your organisation have policies/procedures to ensure that relevant contract documentation, arrangements, or agreements requires sub-contractors to comply with industrial relations laws?	<input type="checkbox"/>	X	Instruction: If 'No', briefly explain <ul style="list-style-type: none"> the reason/s for this response; and whether your organisation is currently taking steps to implement a policy/procedure relating to your organisation's sub-contractors (including implementation process and timeline). <p>Our organisation does not utilise subcontractors for the services provided under the proposed contract. As a result, we do not have specific policies or procedures in place to ensure that subcontractors comply with industrial relations laws. All work is performed directly by employee associates.</p>
4. Does your organisation have policies/procedures that promote access to secure and permanent employment?	X	<input type="checkbox"/>	Instruction: If 'No', briefly explain <ul style="list-style-type: none"> the reason/s for this response; and

			<ul style="list-style-type: none"> whether your organisation is currently taking any steps to implement a policy/procedure relating to secure and permanent employment (including implementation process and timeline).
5. In the past 24-month period, has your organisation complied with its obligations under applicable workplace relations laws?	X	<input type="checkbox"/>	Instruction: If 'No', briefly explain the reasons for your response:
6. In the past 24-month period, has your organisation failed to make the following payments relating to minimum wages and employment conditions? <ul style="list-style-type: none"> wages including penalty rates, overtime and casual rates; allowances; annual leave; long service leave; superannuation; workers compensation insurance; and any other lawful payments where they are specified in a modern award or enterprise agreement 	<input type="checkbox"/>	X	Instruction: If 'Yes', briefly explain which payments have not been made and why:

(e.g. payments made to redundancy funds)			
<p>7. In the past 24-month period, has your organisation been subject to:</p> <ul style="list-style-type: none"> any findings against it by a court, tribunal or regulator regarding breach of a workplace law listed in Question 1? any proceedings in respect of a breach of workplace law listed in Question 1? 	<input type="checkbox"/>	X	Instruction: If 'Yes', provide further information about the event/s?

SCHEDULE 15 – OTHER RELEVANT INFORMATION

Tenderer may submit any other information they consider would support their submission particularly by writing below or attaching supporting documentation. Please detail any matters which have not been covered in previous sections and you believe need to be taken into consideration when your offer is evaluated.

Gartner and Wannon Water have partnered to help drive better decisions, speed up decision making and save technology costs since 2018. In the several years, Gartner has successfully supported Wannon Water to achieve these outcomes.

In 2023/24, some of the highlights of the partnership were:

- Helped to review a cyber security strategy presentation to the board of Wannon Water. the qualitative value of ensuring that the strategy was pitched at the right level and was aligned to what the board needed to see led to positive outcomes in credibility and provided decision confidence to the board that security was a necessary investment and secured buy in. This paved the way for future constructive relationships and discussions with the board as a trusted advisor and driver of business value. It was a first impression on some members of the board, as such it was critical to present in a way that was aligned with their level of strategy. Andrew Jeffers reached out post the presentation and mentioned that it was spot on and delivered strongly. It was instrumental in securing additional OT headcount in the security team. This headcount was able to get over the line in the days following the board presentation.
- Provided maturity assessment of Data and Analytics function, namely, IT Score for Data and Analytics. Providing this assessment represents a consultancy spend avoidance of over \$60,000. Wannon Water's Data and Analytics strategy will be built off the back of the results of the IT Score for Data and Analytics. Bringing in a consultant third party to complete this strategy piece for Wannon Water across the business represents a consultancy spend avoidance of an additional \$100,000.

Some Highlights from Previous Years:

- Microsoft Agreement Negotiation 2020 - \$316,000 saving
- Cyber Security Service Provider Selection 2020 - \$100,000 saving
- Maximo Agreement Negotiation 2020 - \$50,000 saving
- Salesforce Contract Negotiation 2023 - \$50,000 saving

Some Quotes from Gartner Supported Seatholder:

- "The call with Neha was exactly what we were looking for, spot on. We needed thought leadership on this topic as we look to evolve as a business and Neha's ideas will prove very valuable to how Digital is perceived in the org moving forward."
- "When discussing OPEX vs CAPEX, Chris Ganly Gartner analyst sent reading material around this, definitely will be valuable. There is a real shift between CAPEX and OPEX model license purchasing. This will impact how I will do budgeting."
- "They got some good risk mitigation from the calls with Gartner. The procurement approach was part of discussion. Developing and building the project team, recruitment and defining roles and responsible. There has been a cost avoidance from this, by using consultants to develop a road map – they \$20-\$40K cost avoidance"
- "I am going to sit down with key stakeholders from both information services and from our customer relations teams to run the assessment once more. The digital strategy is already

pointing to a need for us to uplift our own maturity in the terms of the data and analytics side of the business. We know that with Salesforce coming next year we need to be in a position where the D&A framework at Wannon is ready to accommodate salesforce and drive value. Without Gartner, this assessment would have cost \$50k-60k per, without the ability to repeat and compare.”

- “The Data and Analytics strategy will be built off the back of the results of the IT Score for Data and Analytics, bringing a consultant in to complete this strategy piece for Wannon across the business would have cost upwards of \$100k.”
- “The conversations with the Gartner analyst Zarco and Ethan, really supported our thinking, validating our plan. Although high level and early in the project, it supported our thinking and they helped me articulate our plans to business leaders internally.”

Gartner consistently reviews the success and return-on-investment of the partnership with Wannon Water to ensure we are delivering to expectations and are delivering return on investment on the Gartner partnership. Gartner regularly takes on feedback from Wannon Water in terms of current return on investment and what expectations for success looks like.

Please refer to **Appendix 2 – Wannon Water September QBR** for details of the most recent service review between Wannon Water and Gartner for your reference. The slides are part of a regular delivery cadence where the Gartner account team (Account Executive and Senior Sales Manager) will conduct quarterly strategic account reviews to ensure maximum value delivery, and to review service and support structure on an ongoing basis that is best suited. The attached appendix is the most recent example of one such meeting that Gartner account team has conducted with Wannon Water.