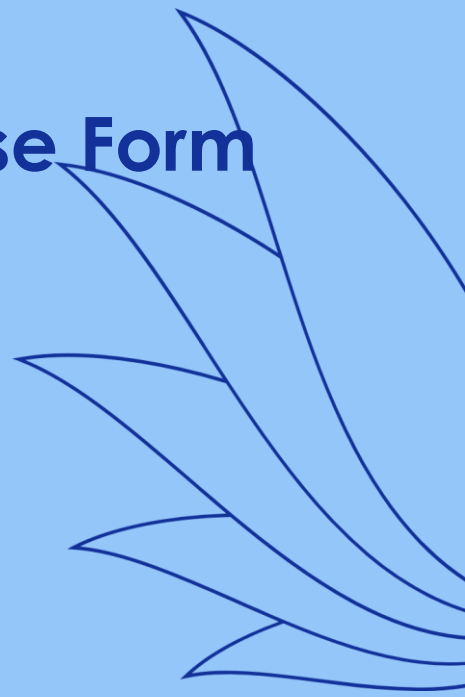




# **Request for Tender RFT-2419 Data & Analytics Transformation Project**

## **Part D – Tenderers Response Form**

Date: 11/09/2024



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## Part D: Tenderers Response Form

### 1. Tenderer Instructions

***Tenderers that do not comply with these “Mandatory Instructions” may have their tender submission rejected.***

Tenderers must provide an electronic copy of Part D – Tenderers Response Form in “.doc” format.

PACIFIC BLUE AUSTRALIA may also ask the Tenderer to submit pricing in “.xlsx” format or equivalent, this will be provided in the tender package as an attachment.

All responses must be provided within the specified tables provided and cannot be altered.

Any additional you may wish to add can be attached as “additional information” at the end of your submission as a separate part.

All electronic documents must be virus checked before lodgement.

### 2. Tenderer Offer

#### 2.1 Tenderer Offer

The Tenderer specified below offers to execute the Works, supply the Goods, or perform the Services (as is appropriate) in accordance with the contract conditions included with the RFT documentation for the amount or amounts set out in these Tender Documents.

The Tenderer warrants that all information contained in this Tender is accurate and complete. The Tenderer warrants that it has not, in this Tender or as part of the tender process, provided any inaccurate or misleading information to PACIFIC BLUE AUSTRALIA or representatives of PACIFIC BLUE AUSTRALIA. The Tenderer warrants that it has read the Request for Tender documentation, fully understands the RFT documentation, and has fully acquainted itself with all matters relating to the proposed contract.

The Tenderer acknowledges that it is bound by the Conditions of Tender and that this offer cannot be revoked except in accordance with the Conditions of Tender. The Tenderer acknowledges that if any part of this Tender is incomplete or otherwise not in accordance with the RFT documentation PACIFIC BLUE AUSTRALIA may be able to pass over the Tender or otherwise deal with the Tender in accordance with the Conditions of Tender.

The Tenderer acknowledges that, if its tender is accepted, it is required to execute a contract in the form included in the RFT documentation and the Tenderer gives its unqualified acceptance of the conditions of contract (subject only to the schedule Compliance with Contract).

#### 2.2 Respondent's Declaration

The Respondent has fully acquainted itself with this Tender document and all matters relating to the proposed services.

By submitting a response, the Respondent warrants and represents that:

- a) All of the information provided in its response is true and correct.
- b) It has no non-disclosed conflicts of interest.
- c) The tender is valid for acceptance for a period of 90 days as required under this Tender.

- d) It has made its own enquires and investigations and has obtained professional advice and all other relevant information to inform itself of all risks and contingencies which may affect its response.
- e) All parties nominated in this response including, subcontractors, agents and internal departments are aware and conversant with the terms and conditions of the proposed contracts and this response.

The person executing this Tender on behalf of the Tenderer warrants that they are authorised by the Tenderer to execute the Tender and that, by so executing the Tender, the Tenderer is bound by it.

## 2.3 Tender Authorisation

2.3 Tenderer Authorisation	
Registered Company Name	intelia Pty Ltd
Authorised Signatory	
Print Name	Joel Collins (Co-Founder, Director)
Date	30.09.24
<b>Witness:</b>	
Signature	
Name	Madeleine Brody
Position Description	Head of People
Date	30.09.24

## 2.4 Tenderer Details

Please provide your company contact details. Please also include a chart showing the broader company ownership structure.

• 2.4 Tender Details	
Registered Company Name	intelia
ABN	41 621 763 693
Primary Contact Person	Hugo Bates
Position Description	Client Principal
Mobile number	0406 198 590
Email	Hugo.bates@intelia.com.au
Parent Company (if applicable)	N/A

### 3. Understanding of Service Requirements

Demonstrate an understanding of the requirements for provision of the required services and how the Tenderer proposes to meet the specifications.

#### 3.1 Understanding of Service Requirements

intelia was founded in 2018 and are a proudly Australian-owned technology consultancy, specialising in data, cloud and intelligent automation services & solutions. With a market-leading global partner ecosystem, underpinned by extensive experience in implementing data projects for enterprise customers, intelia are committed to delivering with precision, innovation and transparency.

We have a clear understanding of Pacific Blue Energy's requirements for this project. Our approach, experience and data skills will ensure we are able to define this strategic roadmap for PBE at all layers of your data architecture and deliver within the required time frame to ensure PBE's objectives are met.

Below we have broken down each layer of PBE's architecture, reiterated our understanding of what is required for each and presented intelia's approach.

##### **Consumption:**

Pacific Blue require analysis of the current state to understand:

- 1) Stocktake of existing reports - PowerBI & SSRS
- 2) Identify what is being used, what can be rationalised
- 3) Review adequacy of data security and governance frameworks
- 4) This analysis will identify gaps and opportunities that are to be addressed as well as the develop strategic roadmap for Consumption layer (from/to)

##### ***How would intelia address this?***

Through effective analysis intelia would discover root problems and work with business stakeholders to understand their requirements and priority use cases.

Analysing the current state and completing an Impact Assessment, covering gap analysis, interviews with relevant stakeholders will help uncover the story being told, i.e. how reports are being used? What are critical data elements part of reports? What data gaps can be identified?

Additionally, this current state analysis will assess current data governing and security practices.

intelia have a strong record in uncovering data problems and presenting the story back to the business. This would be no different and intelia would present findings of current state and then outline a consumption layer road map.

##### **Modelling:**

Pacific Blue requires the right level of technical and analytical skills, to:

- (a) Map & document current data models
- (b) Catalogue data definitions
- (c) Assess suitability of data models vs future state Consumption layer
- (d) Develop strategic roadmap for Modelling layer (from/to)

##### ***How would intelia address this?***

Data Modelling is at the core of our engineering capability. We have a rich history in developing detailed schema designs and models. The following modelling methodologies and concepts

such as Data Vault, linking multi-level relationships and presenting a view of how the current state relational models are mapped, will assist in the preparation for a proposed new relational model. Showcasing development and progress of models / the road map with Pacific Blue stakeholders and incorporating their feedback will be essential to the success of these outcomes.

**Staging:**

To assist Pacific Blue in defining their staging environment, they require skills to:

- Complete & comprehensive ETL process documentation
- Identify opportunities to improve existing ETL processes
- Ensure adequate redundancy measures in place for ETL jobs
- Develop strategic roadmap for Staging layer (from/to)

***How would intelia address this?***

As with other engagements, producing a Data Migration or ETL strategy on how data will be moved is an integral part of any data roadmap.

Intelia leverages industry best practices and intelia SME's to define this strategy which will ultimately act as a 'true north'.

This strategy would include details such as ETL process and tech (based on analysis completed), staging roadmap including security, data (storage, redundancy and ETL) best practices.

Showcasing this strategic document on a regular basis and bringing Pacific Blue on the journey would be crucial to ensure both vendor and client are aligned and successful.

**Sourcing:**

Pacific Blue requires the skills and experience to define:

- Stocktake of current data sources, both internal and external
- Identify any source data gaps or rationalisation opportunities
- Define optimal role of Energetiq & Redshift in D&A
- Define sourcing requirements for Unique Customer ID
- Develop strategic roadmap for Sourcing layer (from/to)

***How would intelia address this?***

Intelia would typically complete a Data Quality assessment on current data sources to identify gaps as well as highlight the health of Pacific Blues data. Through this process, sources would be catalogued.

This assessment would assist in highlighting areas of tech enhancements and rationalisation.

Aligning with the data strategy, the strategy will outline best practices in relation to approach on data and analytics engineering ways of working and outline areas of efficiency.

## **4. Experience, Capacity, Resources and Availability of Staff**

### **4.1 Experience**

Demonstrate the relevant experience of the organisation in delivering services as detailed in Part B – Specifications. This would include descriptions to similar work provided to other comparable organisations.

#### **4.1 Experience, Capacity, Resources & Staff Availability**

intelia operates with an authentic and unique approach to helping our customers accelerate the opportunities, commercial benefits and competitive advantage that can be unlocked in a data-driven world.

We are one of Australia's largest pure play data & analytics consultancies, headquartered in Melbourne and Sydney. intelia offers a team of 80+ Engineers and we have extensive experience in supporting clients on Data Strategy specific projects, as well as delivering solutions to numerous clients in the Energy sector.

We have delivered across all industries and have built-up a considerable amount of experience, expertise and a deep understanding of the Energy industry. We understand how beneficial an agile, boutique data consultancy is for our clients specifically in the Energy sector, providing tailored support, with a deep understanding of the industry, the specific challenges faced and the best approach to ensure success. We've built up an outstanding team of consultants that continue to satisfy our clients' goals and over time created an Energy Practice the culminates these projects, learnings and skills to support deployment and delivery for our Energy clients.

We have delivered a diverse range of projects for our clientele and have selected four key case studies to present below. We have delivered many other projects, as well as energy specific projects that are available on request e.g. CDR, VPP, 5MS, DER etc

**Client:** AEMO

**Project:** D&A integration Transformation

Our Head of Delivery led AEMO's Data Analytics and Integration Transformation as part of their broader AUD \$150M Digital Transformation Program from 2019 to 2022. intelia directly delivered & led delivery of a number of key outcomes, including:

- (a) Developing the Data Strategy and Capability Model
- (b) Introduction and embedding the new Data Governance capability including implementation of Collibra (Governance) and Ataccama (Master Data Management)
- (c) Implementing the new cloud-based Enterprise Data Platform (Azure Databricks on Microsoft Azure) and then migrating off and retiring their legacy data platforms (saving approx AUD \$6M per year)
- (d) Undertaking a wide-scale analysis and review of their current reporting landscape
- (e) Introducing Microsoft Power BI as the standard analytics and visualisation tool
- (f) Introducing a number of new Integration capabilities including Microsoft APIM (API management) and Boomi (Near Real-time Integration)
- Enabling the Energy Forecasting teams to leverage Machine Learning capabilities available on the new EDP to vastly improve and speed up their forecasting activities (60% reduction in time and effort)

In addition, intelia were engaged to provide a number of data consultants supplying specialist data services ranging from project management, technical data analysis, business analysis, architecture & design, engineering, analytics and visualisation on a number of AEMO programs including 5 Minute Settlements (5MS), Virtual Power Plants (VPP), Distributed Energy Register (DER), Consumer Data Rights (CDR) and WEM Reform.

**Client:** MLC

**Project:** Data Strategy / Operating Model

intelia was engaged to review the current operating model, engagement, and delivery processes for MLC's EDW environment, specifically targeted at Snowflake, Informatica Intelligent Cloud Services (IICS) and Microsoft Power BI technologies.



Over a three-week period, intelia conducted interviews with senior stakeholders heading primary functions within the MLC Data & Analytics team to understand current state, pain points, challenges and opportunities.

In particular, intelia were requested to identify opportunities to increase speed to providing insights (which is currently considered to be problematic) via reducing complexity and ambiguity, reducing manual and / or duplicated effort, minimising / removing re-work and multiple hand offs, and improving processes.

intelia were also asked to explore potential opportunities to improve the general operating model structure, roles and responsibilities, taking a DataOps framework into consideration.

This document provided a summary on feedback received, resulting observations, and a series of nine actionable recommendations for the MLC Data & Analytics team to consider for implementation.

**Client:** Deakin University

**Project:** Data Strategy – Unified Data Model, Data Vault Methodology, Data Quality and Tech Reconciliation

intelia was engaged as a key data partner for the University to commence on a program of work to ultimately assist the ineffective information management preventing the University from making more informed and timely decisions. By engaging intelia as their key data partner, the Program wanted to realise benefits that would:

Improve staff and higher degrees by research (HDR) student productivity and capacity to undertake research and innovation.

Be more effective research operations and services.

Schedule 1 Have better data driven decisions to optimise strategic investment

Having an agreed and endorsed Data Migration Strategy, assisted Deakin to understand how technically data will be migrated as well as set expectations on effort, time and skill needed. Utilising the Unified Data Model and migrating data through the Data Vault methodology, data was in a consumable format to easily allow for technical transformations, Data Quality reconciliations, business approvals in an iterative approach allowed us the ability to and migrate data.

As a result of executing on Deakin's strategy, data was successfully migrated into production without any defects. - *"The intelia team are highly professional and are experts in data and getting the job done. We don't see them as another vendor but rather one of us"* - Deakin, Program Manager

**Client:** Goodman Group

**Project:** Power BI (MS) & new development

intelia have been providing expert Microsoft Power BI managed support and development services to Goodman for over three years. The service involves supporting and managing the Power BI platform and existing dashboards across a global user base, as well as enhancement requests and / or development of new dashboards to meet reporting needs.

intelia assessed Goodman's data needs and designed a data integration, storage and reporting solution. intelia also developed an end-to-end solution, including full integration with the client's cloud development environment on Azure DevOps.

The approach taken to address Goodman's problems included:

- Reviewed current data analytics environment and recommended on DevOps best practice.
- Consulted with stakeholders on reporting requirements for Corporate Services Strategic Initiative and Asset Data Reporting.

- All source code and documentation were committed to the client's source control repository.

### Availability

When it comes to "availability" with "right set of skills and experience", intelia always takes time and care to identify and assign consultants who are the right fit for our client engagements in terms of:

**Technical capability:** we select Consultants who have experience and expertise in the solutions that either already exist, or will be implemented into, the client's eco-system.

**Availability:** we select Consultants who can be reasonably committed to delivering the engagement in full, taking into consideration any potential planned leave etc. Should an unexpected event occur making a key resource unavailable, intelia will replace that person with an equivalent and ensure no impact to engagement delivery for PBE.

**Organisational culture:** we recognise that engagements are about "people working with people" and we aim to identify Consultants who will naturally thrive in certain organisation / team scenarios.

**Balance:** depending on needs of the engagement, we strive to ensure our team of consultants is well balanced to provide the greatest coverage of overall levels of expertise, experience, backgrounds and traits (including diversity and inclusion considerations).

Further, intelia's workforce is comprised of permanent employees which reduces risk of unplanned turnover of key personnel, and, in addition, as a specialist Data Consulting organisation with broad and deep capabilities across a wide range of data-related areas, in the event that a key resource unexpectedly became unavailable, intelia will replace that person with an equivalent and ensure no impact to engagement delivery for PBE..

To this end, we focus heavily on talent management and maintain a strong retention track record of which we are proud. We also make it a conscious internal practice to share our knowledge and experiences as a means to reduce the risk of any one person becoming a potential single-point of failure for our client engagements.

Typically, intelia prefer a minimum of 1 to 2 weeks' notice to provide resources to PBE, subject to resource availability. As a fully Australian owned and local organisation with circa 80 full time permanent employees, we value the importance of being agile and nimble to provide our clients with a bespoke working solution.

Include supporting documentation where necessary, to demonstrate satisfactory technical capability and experience to undertake the works services in a manner satisfactory to PACIFIC BLUE AUSTRALIA

## 4.2 Key Personnel

Please provide the relevant experience, qualifications (CV to be attached) and their availability of key staff who will be responsible for the delivery of the services relating to this project and identify who will be the lead person on this project.

4.2 Key Personnel				
Name	Position Description	No. Years of service	Experience	Availability (staff)
Andrew Nisbett	Head of Delivery	30	Andrew is the Head of Delivery at intelia, holding over 30 years' experience spanning multiple industries including Energy, Fastmoving Consumer Goods, Agriculture, Banking, Telecommunications, Directory Services	Available to provide project oversight for this engagement

			<p>/ Advertising and Government. Andrew has extensive experience in defining, initiating, planning, governing, managing and successfully delivering end-to-end projects. An effective communicator, Andrew is pragmatic and practical in leading, managing and working with teams to find a way to deliver successful outcomes that add genuine business value and ensure business investment in IT is not a wasted endeavour</p> <p>Andrew is currently acting in the role of Global Group Manager of Nufarm's new Data &amp; Analytics function. This involves creating their data &amp; analytics strategy, defining and establishing the team and ways of working.</p>	
Direnc Uysal	CTO	18	<p>Direnc has over 18 years' experience in helping large companies plan, deliver and manage programs that enable new operating models through the adoption of innovative technology.</p> <p>Direnc has a wealth of experience across the full SDLC with specialist skills in the areas of solution design and strategy, cloud application development, digital consulting, emerging technology implementation and project management. He has a diverse background working closely with technology and business stakeholders as well as managing multiple vendors and global teams from project inception through to handover and support.</p>	Available to provide project oversight for this engagement
Radhika Ramachandran	Senior Data Engineer	10	<p>Radhika is a Senior Data Engineer with vast experience and expertise in the Energy, Education, Banking, Health Insurance and Retail sectors. Radhika has proven experience in Azure Cloud, Big Data Solutions, Data Warehousing, Business Intelligence (ETL, Reporting) and Analytics. Highly skilled in using visualisation tools like Power BI, Radhika has extensive experience in developing, testing, and deploying code to high standards across various programming environments.</p>	TBC
Vilas Patel	Principal Program Manager	17	<p>Vilas is a Principal Consultant at intelia. A seasoned Project / Program Manager and Scrum Master, Vilas has over 17 years of IT experience. Possessing a great blend of technology (Azure,</p>	TBC

			DevOps, AEM) and management experience, Vilas has strong Domain knowledge across Energy, Telecom and Utilities. Working for various organisations globally across the USA, UK and APAC region, Vilas is practised across multiple industry verticals, delivering end-to-end programs achieving quality output.	
Aungshu Barman	Senior Data Engineer	8	Aungshu is a Senior Data Engineer at intelia. An experienced technology professional, Aungshu specialises in data engineering and management, data warehousing, data staging, ETL/ELT, visualisation and performance tuning, across project delivery, BAU and support. An expert in developing end-to-end analytics solutions, Aungshu builds fault-tolerant data pipelines from heterogeneous sources and develops analytical reports/dashboards enabling effective decision-making.	TBC
Erin Veitch	Senior Business Analyst	6	Erin is a Senior Consultant at intelia, an experienced Senior Business Analyst and delivery professional with a passion for technology and a keen interest in AI/ML. Erin strives to be at the forefront of leading change through the evolution of robotic process automation in the workplace. Erin's strengths lie in designing people-centred business solutions, facilitation and communication. Erin has know-how in Data Analysis, Data Modelling, Design, Development and Implementation of Data Warehouse and Data Migration in the Energy, Banking, Insurance, Telecom and Retail Domains.	TBC
Simon Masters	Principal Consultant	25	Simon is a Principal Consultant at intelia, with a wealth of experience in business analysis, project management, software development and application support. Simon possesses strong business acumen, and a genuine desire to resolve not only the "how" but the "why". Adept in building meaningful stakeholder partnerships, Simon conducts alignment between business and IT stakeholders, allowing problems to be solved and business needs to be met.	TBC
Abhishek Gupta	Senior BA	15	Abhishek is a keen, inquisitive and dynamic Business Analyst with a passion and specialisation in Data Analytics. Abhishek holds 15+ years of experience as a Senior Business Analyst and delivery lead. He is driven to achieve strategically planned objectives and	TBC

			goals that ensure the delivery of exceptional and measurable results.	
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#### 4.3 Project Experience

Please provide details of the relevant experience and methodology used to implement similar projects, to ensure a successful outcome.

4.3 Project Experience				
Project Name	Customer Name	Start Date (mm/yy)	End Date (mm/yy)	Experience/Methodology Used
Data Strategy & Capability Model	AEMO	06/19	06/22	Please see above (4.1)
Data Strategy / Operating Model	MLC	09/22	11/22	Please see above (4.1)
Data Operating Model Review	Deakin University	06/22	10/22	Please see above (4.1)
MS – power BI support	Goodman Group	02/21	Current	Please see above (4.1)

#### 4.4 Referees

Please provide 3 referees

4.4 Referees	
Referee 1	
Registered Company Name	Australian Energy Market Operator (AEMO)
ABN	94 072 010 327
Contact Person	Tim Hewat
Position Description	Head of Enterprise Data Services - AEMO (role at time of engagement) Head of Data and Analytics - Suburban Rail Loop Authority SRLA (current role)
Mobile number	0450 876 861
Email	timothy.hewat@srla.vic.gov.au

Referee 2	
Registered Company Name	MLC Life Insurance
ABN	90 000 000 402
Contact Person	Scott Williamson
Position Description	Head of Data & Analytics
Mobile number	0438 982 618
Email	scott.williamson@mlcinsurance.com.au

Referee 3	
Registered Company Name	Deakin University
ABN	56 721 584 203
Contact Person	Dorothy Nuess
Position Description	Streamline Program Director
Mobile number	0410 832 894
Email	d.nuess@deakin.edu.au

## 5. Approach, Methodology and Quality Assurance

### 5.1 Project Methodology

Describe the Tenderer's approach to undertake the works, methodology for delivery of the works and how they will minimise the impact on PACIFIC BLUE AUSTRALIA's business. This is to also include the tenderer's quality assurance accreditations and quality processes to be used.

Also outline capacity to deliver the required services at a very high standard in a timely manner, commitment to customer service, commitment to gaining technical and quality certifications and accreditations and overall quality of performance.

#### 5.1 Approach, Methodology and Quality Assurance

Our client's success is the core to our success.

We deliver what we promise with precision, innovation, quality and care. When it comes to an overarching delivery framework, we believe in keeping things simple, clear and elevated beyond complexity.

Prior to commencement, we strive to sensibly ensure absolute clarity and agreement on seven key elements which become our shared "true North", as shown in the following diagram. This includes clearly agreeing and documenting key deliverables along with acceptance criteria, used to ensure delivered outcomes meet expectations.

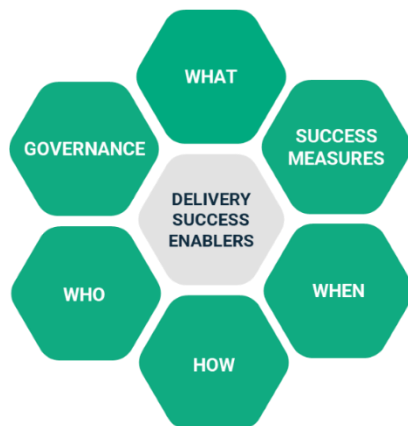
Through the process of ensuring this up-front clarity, we remove risk of ambiguity and / or misaligned expectations and create the best starting position for a mutually successful outcome.

In some situations where a certain business challenge may be incredibly complex and therefore

up-front clarity may not reasonably be able to be provided, intelia work closely with our clients to ensure a mutually agreed starting position, supported by a set of clearly documented assumptions aimed at creating a path forward with shared accountability and responsibility towards delivering an acceptable outcome that meets expectations.

For in-flight engagements, intelia's Chief Technologist and Head of Delivery typically provide general oversight, advice, guidance, and support to the intelia team, including attending client meetings if and as required. In addition, engagements that meet a set of defined criteria are governed by intelia's internal in-flight project delivery management and reporting framework, which includes regular meetings between the intelia Project Manager and Head of Delivery, as well as internal reporting presented to intelia's Executive Management Team.

intelia's approach ensures a "no surprises" experience for our customers.



#### WHAT: BUSINESS DRIVERS, REQUIREMENTS & CONSTRAINTS

What is the problem you're trying to solve / opportunity you're trying to take advantage of (business drivers), what are the defined requirements and what are the constraints within which we need to work (time, budget, regulations, known issues etc)

#### SUCCESS MEASURES

What does success look like when we're done (desired outcomes / objectives, quality measures, benefits)

#### WHEN

When you need to have it done (deadlines / milestones / schedule)

#### HOW

How we're going to get it done (designs, plans, technology etc)

#### WHO

Who needs to be involved, roles / responsibilities (our team / your team / third parties)

#### GOVERNANCE

How we're going to govern, communicate, monitor & report (meetings & cadence, reporting, dependency, issue, risk & change management etc)

Hugo Bates (Client Principal) will act as the single point of contact for account management activities to ensure a successful outcome for PBE, including commercial discussions, broader partnership discussions, and any issues requiring escalation.

intelia has two offices located in Melbourne and Sydney, both offices can accommodate workshops with Pacific Blue Energy if required. intelia typically engage in a flexible work arrangement and if required intelia resources can work from intelia offices and/or PBE offices.

Resources engaged on PBE project(s) can be provided with intelia laptops or if required PBE laptops.

PBE can draw on intelia's Head of Delivery and Chief Technologist who can provide expert guidance to assist in the successful delivery of PBE engagements.

## 5.2 Customer Service

What methods will the Tenderer employ to provide exceptional service delivery, continuous improvement and innovation?

### 5.2 Customer Service

Intelia invest heavily in our consultant's development and growth.

We provide internal training sessions on the latest technologies as well as specific external training courses with our technology partners. We support their learning and development through new certifications and L&D sessions. We understand the importance of our consultants being trained not only on new technological capabilities but also their soft skills – communication, stakeholder management and task prioritisation. This enables our consultants to be well rounded professionals that can be deployed individually or within a team and maximise the impact that they are able to deliver in their roles. We understand how important an environment that promotes innovation is

and invest significant effort and time across the business and with our technology partners to ensure the intelia consultants feel highly valued and are armed with all the tools and support to deliver excellence on their engagements and support their career growth within intelia.

Intelia leverages agile methodologies in the way in which we deliver projects to enable flexibility and rapid adaption to client needs. Regular sprints and reviews help our team to deliver as intended and pivot if required. We create feedback channels during and after engagements such as client surveys and internal reviews, to gather insights on performance and any areas of improvement. This helps intelia to provide exceptional delivery and supports continuous improvement throughout the business.

As mentioned, intelia's Chief Technologist and Head of Delivery will provide advice, guidance, and support to the intelia team as required throughout the engagement, including attending meetings where required, at no charge to PBE.

Hugo Bates will act as the single point of contact for account management activities to ensure a successful outcome for PBE, including commercial discussions, broader partnership discussions, and any issues requiring escalation.

### 5.3 Bench Marking

Provide details of what the Tenderer considers to be appropriate performance measures and benchmarks and how will you demonstrate this throughout the Contract term?

#### 5.3 Bench Marking

Intelia has successfully delivered numerous data strategy specific projects for our clients. We understand what approach is required to ensure mutual success and maximise the positive outcome of our engagements. Consistently delivering strategy specific engagements has solidified our approach and enabled our teams to build significant IP and best practices on how to engage best with new clients, specifically in the Energy sector.

The way in which we operate and deliver on this type of project and any other project follows the same key principles and performance measures to ensure your requirements and intended outcomes are fully satisfied:

- Agreed scope, timeframe and budget, prior to project kick off
- Agreed milestones by key stakeholders and sign off on these as project progresses through these milestones
- Identification and inclusion of all key and appropriate stakeholders into workshops
- Daily standups with team
- Close communications with CTO, HO Delivery & Client Principal to help assist on any requests the PBE team may have.

We would like to emphasise that we are a local, boutique, agile, data consultancy. We provide a personable service with the aim of becoming your long-term strategic advisor. We appreciate that this will only occur by consistently delivering at a level of excellence. Our goal is to build a long-term partnership with Pacific Blue Energy and create a partnership whereby you can leverage our expertise and senior leadership at any moment for any questions or ideas to help support PBE's vision and tech aspirations.



## 5.4 Transition In / Out

Provide a high-level transition in / out plan identifying tasks, dates and responsibilities by key personnel to achieve a seamless approach to the service requirements.

### 5.4 Transition In / Out

Intelia has a deep understanding of the Energy sector, gathering valuable knowledge on the way in which Energy organisations operate, the likely challenges that they face and how to maximise the impact that we have when delivering projects in this sector. However, we appreciate that every organisation is unique and we will take a number of steps to ensure an efficient commencement of project:

- Onboarding process – intelia's Client Principal will work closely with PBEs talent team to ensure they have all the details for onboarding intelia's consultants and are supported with any requirements e.g. PI data, Security checks etc
- Roles and responsibilities: Roles and responsibilities are clearly defined to ensure PBE stakeholders are aware of the respective resources and the tasks / streams they will be completing
- Kick off meetings: A kick off meeting involving all stakeholders and delivery team to ensure all team members are met, aligned and an approach of open communication is set from the get-go.
- Project closure meeting: The purpose of this meeting is to ensure that every milestone and associated scope items are discussed and accepted, so that PBE's stakeholders are fully satisfied with the delivery of this project.

Our key personnel have worked in the Energy sector with multiple clients for a number of years, with retailers, wholesalers and regulatory bodies. Intelia has the ability to deploy teams with a high degree of expertise in the Energy sector but also provide support through Senior internal resources such as our CTO that aren't deployed within the dedicated delivery team. We can provide support as needed to ensure our team has all their questions answered, without leaning on PBE's stakeholders and ensure our delivery is maximised and interruptions to PBE's operations is kept at a minimum.

This industry specific expertise, underpinned with a team that has delivered very similar Data Strategy pieces for comparable organisations, means that our teams ramp up is little to none and our deployed teams can execute seamlessly once all required access is provided.

The specific dates of delivery and execution are clear from this RFT, we will be able to deliver this project in the desired 12-week period and ensure all desired outcomes are met.

We appreciate that the retention of IP is critical to any business. To ensure a seamless handover, we prioritize clear communication and comprehensive documentation throughout the project lifecycle. This includes creating detailed records of any specific methodologies, codebases and data models, along with thorough user manuals if required.

intelia prides itself on leaving customers better than when they commence. A key component of this is ensuring that an agreed transition plan is in place for each of our engagements.

This includes highlighting key team members and ensuring a full and detailed knowledge transfer are completed to uplift and enable our customers IP, capability and skills.

As mentioned, our objective is to become a strategic advisor for PBE. We would like to ensure you have access to our leadership team during and after the engagement so that the PBE team feel as supported as possible and can contact intelia easily to discuss any questions or ideas.

## 5.5 Market Differentiation

What is your market differentiation that sets you apart from your competition, to be able to deliver the services?

### 5.5 Market Differentiation

Intelia prides itself on not only being a boutique, specialist data consultancy but also being industry specific experts. Naturally, as the company expanded and the core team already had a fundamental knowledge and significant experience in the Energy industry, it has always been at the core of the work we have delivered and organically, over time, built a very strong practice around the Energy sector.

Intelia has a deep understanding of the Energy industry, gathering valuable knowledge on the way in which Energy organisations operate, the likely challenges that they face and how to maximise the impact that we have when delivering projects in this sector.

We operate with an authentic and unique approach to helping our customers to accelerate the opportunities, commercial benefits and competitive advantage that can be unlocked in a data-driven world.

Headquartered in Melbourne and Sydney, intelia offers a team of 80+ data specialists that are full time permanent employees. Presented below is a highlight of our service offerings that we feel differentiate ourselves from our competition and the services we provide.

- **Deep Industry knowledge:** Specialised highly skilled consultants with significant experience delivering data strategies and projects within the Energy sector. Our case studies demonstrate a proven track record in solving industry specific challenges
- **Agility and flexibility:** Being a boutique, specialist data consultancy with a flat structure, we are able to move fast. We can quickly adapt to your changing needs & requirements as well as providing faster responsiveness and escalations.
- **Hands on collaboration:** we foster strong partnerships with clients through immersive collaboration, ensuring PBEs stakeholders are involved throughout the project lifecycle and feel invested in the outcomes of the project.
- **Strong ethical standards:** we pride ourselves on our data ethics and privacy, building trust with clients by ensuring responsible data handling and all specific regulations / compliance are met.
- **Exceptional CX:** we prioritise a high-tough client experience, with dedicated support and communication channel with Senior leadership to ensure PBE stakeholders feel as valued as possible and understood both throughout the engagement and beyond.

#### Our services:

##### Data & Analytics

- Engineering & Ingestion
- Visualisation & Dashboards (Power BI, Tableau, Looker)
- BI & Analytics Advisory & Transformation
- Data Architecture & Roadmaps
- Integration & API Development
- Advanced Analytics (AI & ML)
- Data Security
- DataOps

##### Specialist Cloud Services

- Architecture & Design
- Workload, Data & Application Migration

- Cloud Data Warehousing (Azure, AWS, Google Cloud Platform)

#### **Intelligent Automation**

- Automation Strategy
- Artificial Intelligence & Machine Learning (AI & ML)
- Business & Robotic Process Automation
- Predictive Analytics
- Customer Engagement Automation & Chatbots

#### **Our people, culture and ethos**

intelia values and invests heavily in our people and culture; in 2023 and 2024 we achieved the "Great Place to Work" and "Best Workplaces in Technology" certifications, ranking #11 across ANZ for workplaces under 200 employees.

intelia has a culture-first approach; we pride ourselves on maintaining our close and collaborative culture. We encourage our team to #beauthentic and embrace bringing their true self to work each day. We are #proudlypassionate about data – sharing knowledge through brown bag and engagement sessions. And we promote cultural conversations, and a healthy balance of work and play.

The ethos on which we operate is not a collection of words; it captures the essence of who we are today and what we are committed to:

##### **#delightthecustomer**

- Our customers' success is the core to our success – we deliver what we commit to with precision, innovation and care. We aspire for all our engagements to become case studies and our key stakeholders to be our referees.

##### **#proudlypassionate**

- We spend an enormous amount of time at work – it's important we work in an environment where we are proud of what we do, care about our delivery and enjoy ourselves. Share the passion to appreciate the opportunities that life has presented.

##### **#onetribe**

- We understand that so much more can be achieved as a team. Embrace each other, the diversity in our thinking, experiences, skills and culture. Celebrate the successes, laugh and support each other in the challenging times.

##### **#beauthentic**

- Bring your entire self to work – be quirky, be fun, be confident and most importantly be yourself. We are an open, transparent, supportive organisation. Our clients love us for this.

##### **#constantlyevolve**

- Never stand still – a progressive organisation can only be successful if we're committed to getting better. Be open to new challenges, do things differently and learn from our experiences.

## 5.6 Value Add

What is your value-add proposition for this Project?

### **5.6 Value Add**

In addition to our expertise in the energy sector and our proven success in delivering data strategy engagements, we bring the experience necessary to ensure the successful completion of this project. We can also provide PBE with key resources to help aid project progression, act as a point of key contact, and can be leveraged for any support of questions at no extra charge -

intelia's Chief Technologist (Direnc Uysal) and Head of Delivery (Andrew Nisbett) will provide advice, guidance, and support to the intelia team as required throughout the term, including attending meetings where required, at no charge to PBE.

Hugo Bates will act as the single point of contact for account management activities to ensure a successful outcome for PBE, including commercial discussions, broader partnership discussions, and any issues requiring escalation.

intelia typically propose a monthly dedicated Commercial Management meeting with the appropriate contract manager to ensure open and transparent lines of communication can be maintained throughout the period. The primary purpose of this meeting, apart from ensuring a strong partnership and relationship, is to review progress, provide an opportunity to seek any clarity that may be required, obtain any key decisions, and escalate any issues / risks impacting delivery outside direct control of intelia to ensure a "no surprises" approach.

We appreciate that every business is unique. We understand that a tailored solution ensures success to PBEs Data Strategy. We offer a personalised approach that is designed to meet the unique requirements of PBE and their stakeholders.

## 5.7 Key Performance Indicators

Please list the key performance indicators that will clearly demonstrate you are meeting and or exceeding the services required.

Category	KPI	Measurement
Service Delivery	1. Scope delivered	Completed & Accepted
	2. Agreed deliverables delivered	Completed & Accepted
	3. End of project closure meeting	Completed & Accepted
Reporting	1. Regular document Meeting Minutes	Completed and all topics covered
	2. Weekly Project Status Reports	Completed and all topics covered
	3. Quarterly Project Status Report	
Invoicing	1. Monthly invoicing based on approved timesheets	Error free / aligned to timesheets
	2.	
	3.	
Other	1.	
	2.	
	3.	

## 5.8 Standards

Please list in the table below any Australian or International standards your company has that are valid. Pacific Blue may request validation of each standard achieved.

5.8 Standards		
Standard Name	Standard Number	Expiry Date
intelia believe this section is not applicable to this engagement. Please discuss with Hugo if further clarification is required		

## 6. Sub-Contracting Management

### 6.1 Sub-Contracting Management

Please describe your selecting, on-boarding, and management procedures for sub-contractors, with emphasis on HSE.

#### 6.1 Sub-Contractors Management:

Not applicable to this engagement, we will not be sub-contracting any services.

### 6.2 Work to be Sub-Contracting Out

Please list the components and or services that will be subcontracted out and the names of the companies who you will use to provide this outsourcing.

6.2 Work to be Sub-Contracted Out		
Sub-Contractor Name	Product/service Subcontracted Out	% of work subcontract out

### 6.3 Sub-Contractor Details

Please list the business names of the companies you will be sub-contracting out by filling in the table below.

6.3 Sub-Contractor Details	
Subcontractor 1	
Registered Company Name	
Contact Person	
Mobile number	
Service Subcontractor Out	
Percentage of Service subcontracted out	
How many years working with Subcontractor	

Subcontractor 2	
Registered Company Name	
Contact Person	
Mobile number	
Service Subcontractor Out	
Percentage of Service subcontracted out	
How many years working with Subcontractor	

Subcontractor 3	
Registered Company Name	
Contact Person	
Mobile number	
Service Subcontractor Out	
Percentage of Service subcontracted out	
How many years working with Subcontractor	

## 7. Cyber Security

This questionnaire aims to assist Pacific Blue to assess the information security readiness and capability of your organisation and any third party you may deal with.

### 7.1 Information Security and Privacy Program

<p><b>Does your company have an information security and privacy program that includes policies, standards, and processes, and does the scope of the program include all information processed as part of this engagement with Pacific Hydro?</b></p> <p><i>Tip: Having a strong security program to adequately protect all confidential information processed or accessed by your company helps demonstrate to your customers that you will be able to keep their information safe. Your program should be based on recognised standards and should be regularly reviewed and audited.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Does your information security and privacy program cover all of your operations, services, and systems that involve access to confidential information?</b></p> <p><i>Tip: Excluding parts of the company from the security program means that out-of-scope processes might put your customers' data at risk. Because overall security level is often determined by the weakest link, your security program should cover all the processes that can directly or indirectly affect the security of your customers' information.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Has your company selected an individual or team to be responsible for managing the information security and privacy program?</b></p> <p><i>Tip: Not having someone formally responsible for information security often means that there are no resources available to make security-conscious decisions, plan controls, and implement policies. Customers typically expect companies to have an adequate security team.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Please provide that person's name and title: <i>Direnc Uysal (CTO)</i></p>
<p><b>Do you have a program to ensure security in your human resources processes?</b></p> <p><i>Tip: Employees handling sensitive information is still a major risk factor for most companies. It's important to have security controls in human resources, including: Job descriptions for all employees with access to confidential or sensitive information Granting access to data solely on a "need-to-know" basis, in accordance with the employee's job description and responsibilities; and revoking access when the need no longer exists.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Do you undertake police background checks on all employees who have access to sensitive or Personally Identifiable Information / data?</b></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>

<p><b>Is your security and privacy program audited or assessed on a regular basis by an internal or external audit function, or a specialist third-party?</b></p> <p><i>Tip: A lot can change within a year, particularly in a field as dynamic and fast-paced as information security. A functioning and well-maintained security program should be audited by a third-party at least once per year, to make sure the company's security program meets industry standards, functions properly, and is adequate to address current threats.</i></p>	<p>Please Select:</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Please provide details of the audits or assessments conducted over the last 12 months: However, intelia undertake internal assessments and audits, please let us know if you require any details.</p>
<p><b>Do your written contracts with relevant third parties require them to adequately protect the privacy and security of all confidential information they may get access to during the partnership?</b></p> <p><i>Tip: To protect confidential data while it is exposed to your outsourcing providers, vendors, and subcontractors, you should contractually enforce security controls similar to your own.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>

## 7.2 Policies, Processes, and Organisation

<p><b>Does your company align to, or are you certified against, any recognisable security standards?</b></p> <p><i>Tip: Standards and guidelines are available for security and privacy programs. Complying with a generally accepted standard helps your customers assess the controls and safeguards that make up your program.</i></p>	<p>Please Select:</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>If so, please indicate the relevant standard(s):</p> <p><input type="checkbox"/> ISO/IEC 27001</p> <p><input type="checkbox"/> PCI-DSS</p> <p><input type="checkbox"/> NIST</p> <p><input type="checkbox"/> Other</p> <p>Other:</p>
<p><b>Please indicate what documents you currently have in place.</b></p> <p><i>Please note: As part of the review process a request to cite one or all of these policies may occur.</i></p>	<p><input checked="" type="checkbox"/> Information Security Policy</p> <p><input type="checkbox"/> Information Security/Cyber Security Framework</p> <p><input checked="" type="checkbox"/> Acceptable Use Policy</p> <p><input type="checkbox"/> Incident Response Procedure/Policy</p> <p><input type="checkbox"/> Business Continuity Plan/Policy</p> <p><input type="checkbox"/> Disaster Recovery Plan/Policy</p> <p><input type="checkbox"/> Data Classification Policy</p> <p><input checked="" type="checkbox"/> Access Control Policy</p> <p><input type="checkbox"/> Secure Development Policy</p> <p>Other:</p>



<p><b>Please select the topics that are covered by your security and privacy policies:</b></p> <p><i>Tip: Organisation security and privacy policies outline the accepted practices and rules by which your company operates. Policies often provide guidance in a specific area, but in some cases, you may have created a policy that covers many areas.</i></p>	<p><input type="checkbox"/> Classification and protection of information</p> <p><input checked="" type="checkbox"/> Human resources, hiring and background checks</p> <p><input checked="" type="checkbox"/> Physical security</p> <p><input checked="" type="checkbox"/> Acceptable use of information and IT devices</p> <p><input checked="" type="checkbox"/> Access control</p> <p><input checked="" type="checkbox"/> Authorised/unauthorised use and disclosure of data</p> <p><input type="checkbox"/> Software development</p> <p><input type="checkbox"/> Incident management and response procedures for both security and privacy incidents</p> <p><input type="checkbox"/> Business Continuity and Disaster Recovery</p> <p><input checked="" type="checkbox"/> Compliance with laws and regulations</p> <p><input type="checkbox"/> Privacy and Notifiable Data Breach</p> <p><input checked="" type="checkbox"/> Retention and destruction of data</p>
<p><b>Do you maintain an external policy or notice to the public, users, or customers, describing how you protect the security and privacy of data?</b></p> <p><i>Tip: In many countries, it's a legal requirement to have an external policy or notice that describes how you handle and protect personally identifiable information. Even when that's not the case, it's best to inform your customers about your methods for ensuring the security and privacy of personal information.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Do you maintain written internal policies, guidelines, and documented practices for the safe handling and protection of data?</b></p> <p><i>Tip: Security policies are an important tool for establishing authoritative security requirements and enforcing them throughout the company. Policies form the basis of any security program.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Does your organisation have a change management process to ensure that all changes to networks, systems, and processes are appropriately reviewed?</b></p> <p><i>Tip: A change management process helps to ensure that the effect of a change is properly assessed before it's implemented. Although it's not necessary for everyday changes within defined procedures to undergo a formal review process, any change that is out of the ordinary should be reviewed and assessed before it's made.</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Do you have processes and procedures to ensure that security incidents are discovered in a timely manner and dealt with effectively?</b></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>

<p><i>Tip: Unfortunately, security incidents are no longer a matter of "if," but "when." Security incident response procedures are an absolute necessity. Make sure you have procedures in place to ensure that incidents are quickly and effectively identified, contained, and investigated</i></p>	<p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Do you have a procedure or policy which aligns to the Notifiable Data breach scheme?</b></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>
<p><b>Select the controls you have in place for identifying security and privacy incidents as quickly as possible:</b></p> <p><i>Tip: Controls are devices, software or services that can be used to provide protections, remove threats, or detect problems that threaten the confidentiality, availability or integrity of your company information or assets.</i></p>	<p><input type="checkbox"/> We have signature- and/or anomaly-based IDS/IPS in place, and sensors are in place at strategic points throughout the network.</p> <p><input type="checkbox"/> We regularly review log files for signs of intrusion.</p> <p><input checked="" type="checkbox"/> We use Anti-malware software. Please give the details of the places where the software is installed: On all consultant laptops.</p> <p><input type="checkbox"/> We apply security Pacific Blue Australia and patches to devices in our network on a regular basis.</p> <p><input checked="" type="checkbox"/> We have Anti-spam and Anti-phishing protections in place on our email service.</p> <p><input type="checkbox"/> We have other methods in place to detect security and privacy incidents. Please detail below:</p>
<p><b>How often does your company review its security and privacy policies to ensure they are up to date?</b></p> <p><i>Tip: Security and privacy policies are most valuable if they are kept current. You should regularly Pacific Blue Australia your policies to reflect changes in processes and security requirements, as well as in response to the threats your company is exposed to.</i></p>	<p><input checked="" type="checkbox"/> Once a year</p> <p><input type="checkbox"/> More than once a year</p> <p><input type="checkbox"/> Never</p>
<p><b>How often does your organisation conduct regular information security awareness training for all staff (including contractors)?</b></p>	<p><input checked="" type="checkbox"/> Once a year</p> <p><input type="checkbox"/> More than once a year</p> <p><input type="checkbox"/> Never</p>
<p><b>Do you have processes in place to ensure that access to data is granted solely on a "need-to-know" basis, in accordance with the job descriptions and responsibilities of users? Do these processes also revoke access when the need no longer exists?</b></p> <p><i>Tip: Minimising the number of personnel exposed to confidential information is key to keeping that</i></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you answered no, please provide a rationale for the limitations:</p>

<p>information secure. Only those with a "need to know" should be granted access to the data. When you have processes and technical controls in place to enforce the need-to-know principle, you greatly reduce the risk of unauthorized data access and other security incidents.</p>	
<p><b>How often do you undertake user access review audits?</b></p>	<p><input type="checkbox"/> Once a year</p> <p><input checked="" type="checkbox"/> More than once a year</p> <p><input type="checkbox"/> Never</p>
<p><b>Has your organisation had any security events or incidents in the last 24 months?</b></p> <p><i>Tip: Security events and incidents occur in all organisations. A strong and mature incident management program will ensure all events and incidents are reported and completely resolved to mitigate risks and potential breach situations</i></p>	<p>Please Select:</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Please provide a short summary of the events below:</p>
<p><b>Is there anything else you want us to know about your security program?</b></p>	

### 7.3 Technical Controls & Operations

<p><b>What systems, software, or services (controls) are in place to protect from malware?</b></p> <p><i>Tip: Anti-Virus or Anti-Malware software provides protection for systems and platforms from malicious software.</i></p>	<p>Please provide details:</p> <p>SentinelOne</p>
<p><b>What processes are in place to prevent the loss of or theft (exfiltration) of sensitive data, particularly personal or confidential data?</b></p> <p><i>Tip: Ensuring that you label and protect your sensitive and confidential information from loss or theft can ensure that your company remains competitive and that your organisation will not suffer financial, reputational, or legal losses as a result.</i></p>	<p>Please provide details:</p> <p>Our consultants are under an employment agreement that extensively details their obligations. Most of the work our consulting team does is using client devices in client systems and are restricted from using any external devices to connect to these systems. In cases where our team use their own devices, these devices are secured with both encryption and virus protection software to protect the information stored and accessed on them.</p>
<p><b>What processes are in place to monitor, log and audit events in your infrastructure?</b></p> <p><i>Tip: Systems should be monitored, and information security events recorded. Operator logs and fault logging should be used to ensure information system problems are identified.</i></p>	<p>Please provide details:</p> <p>All of our internal systems are managed and maintained by a managed service provider who regularly audits usage and exceptions and provides exceptions reports as and when needed.</p>

<p><b>How do you manage user accounts, user access and passwords in your infrastructure?</b></p> <p><i>Tip: User Access Control addresses how users are authenticated and authorised to access services. This includes management of user accounts from registration through to de-registration. Strong password policies are required to reduce the risk of password guessing and brute-force attacks.</i></p>	<p>Please provide details:</p> <p>Our internal infrastructure is limited to email and collaboration applications. Users are mandated to have a strong password policy and required to change passwords quarterly.</p> <p>All staff are involved in onboarding and offboarding processes to ensure access is removed once no longer needed.</p>
<p><b>Is Multi-factor Authentication used across the organisation?</b></p>	<p>Please Select:</p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p><b>How many administrator accounts are in use in your environment?</b></p> <p><i>Tip: Too many administrator accounts can create risks in your environment and allow attackers to easily gain access to your systems.</i></p>	<p>Please provide details:</p> <p>None – intelia staff do not have administrative access to our domain as this is managed by a third party service provider.</p>
<p><b>What physical security controls do you have in your facility?</b></p> <p><i>Tip: Critical or sensitive information processing facilities should be housed in secure areas, protected by defined security perimeters, with appropriate security barriers and entry controls. They should be physically protected from unauthorised access, damage, and interference.</i></p>	<p>Please provide details:</p> <p>Both of our physical office locations are behind 2 layers of physical security that are code protected. Additionally all sites are governed by 24 7 CCTV.</p>
<p><b>What forms of Business Continuity and Disaster Recovery systems do you have in place to ensure your organisation can recovery from an incident or loss of data?</b></p> <p><i>Tip: Organisations are required to address business continuity, disaster recovery and availability to ensure the organisation can continue to deliver products or services consistently and during adverse situations. This can be achieved with system backups, cloud-based services, hot or cold redundant sites or sites and data replication.</i></p>	<p>Please provide details:</p> <p>Our email and collaboration software is managed by a 3<sup>rd</sup> party and held in a fully redundant cloud platform.</p>
<p><b>What methods or services can your employees use to gain access to your company after business hours or when traveling?</b></p> <p><i>Tip: When providing remote access to employees Two-Factor Authentication (2FA) reduces risk by requiring a user to have a physical "token" before they may authenticate to a system. This could be a hardware token or a mobile phone that receives an SMS code.</i></p>	<p>Please provide details:</p> <p>2FA is enabled on all accounts and devices by default. This is protected using the Microsoft Authenticator application.</p>
<p><b>What methods to you use to patch systems and check systems for vulnerabilities?</b></p> <p><i>Tip: Vulnerability Management addresses the identification of vulnerabilities and misconfigurations and their remediation. Patch Management looks at the application of security patches to remove identified vulnerabilities.</i></p>	<p>Please provide details:</p> <p>Vulnerability management is handled by our IT managed services provider. We do not run any applications or platforms ourselves outside of email and collaboration software.</p>

## 8. Compliance with Specification

Tenderers are required to submit a complying Tender in accordance with the Conditions of Tender.

The Tenderer warrants that, except for the matters listed below in the Specification Compliance Table, the Tender fully complies with the Specification in Part B, notwithstanding any statements made elsewhere in the tender or in any other document.

This Schedule overrides all other provisions of the tender and any statements qualifying or purporting to qualify the tender.

Incomplete Tenders may be disqualified or assessed solely on the data received.

All aspects specified in the Specification in Part B should be regarded as mandatory requirements, unless explicitly identified otherwise.

## 8.1 Specification Compliance

8.1 Specification Compliance	
The Tenderer warrants (tick appropriate box)	Tick Box
Complies fully with the Specification in Part B without qualification (if the Tenderer selects this alternative, the Specification Compliance Table below should <b>NOT</b> be completed)	<input checked="" type="checkbox"/>
Complies fully with the Specification in Part B subject only with the matters identified in the Specification Compliance Table below (if the Tenderer selects this alternative, the Specification Compliance Table below <b>MUST</b> be completed).	<input type="checkbox"/>

## 8.2 Specification Non-Compliance

8.2 Specification Non-Compliance		
Clause No.	Heading / Description of Clause	Details of Non-Compliance

## 9. Health, Safety and Environment

### 9.1 Environmental Policy and Practices

9.1 Environmental Policy and Practices		
The Tenderer warrants (tick appropriate box)	Yes	No
Does the Tenderer have a current and publicly available statement or policy that commits it to environmental sustainability and reducing environmental impact?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If yes, + what year was it created	2020	

### 9.2 Occupational health and Safety Questionnaire

Please fill in questionnaire and for those that are marked Yes, PACIFIC BLUE AUSTRALIA reserves the right to request a copy to validate.

9.2 Occupational Health and Safety Questionnaire			
The Tenderer warrants (tick appropriate box)		Yes	No
a.	Is there a written company health and safety policy?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b.	Is there a company OHS Management System manual or plan in alignment with AS/NZ4801?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c.	Has the company prepared safe operating procedures or specific safety instructions relevant to its operations?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d.	Is there a documented incident investigation procedure?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e.	Are there procedures for maintaining, inspecting, and assessing the hazards of plant operated/owned by the company?	<input type="checkbox"/>	<input type="checkbox"/> <b>Not applicable</b>
f.	Are there procedures for identifying, assessing, and controlling risks associated with manual handling?	<input type="checkbox"/>	<input type="checkbox"/> <b>Not applicable</b>
g.	Is a record maintained of all training and induction programs?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
h.	Is there a procedure by which employees can report hazards at workplaces and or on site?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
i.	Are employees involved in decision making over OHS matters?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
j.	Are there employee elected health and safety representatives?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

k.	Is there a system for recording and analysing health and safety performance statistics?	<input type="checkbox"/>	<b>x</b> <input checked="" type="checkbox"/>
l.	Has the company ever been convicted of an occupational health and safety offence?	<input type="checkbox"/>	<b>x</b> <input checked="" type="checkbox"/>
m.	Is your company CM3 Certified?	<input type="checkbox"/>	<b>x</b> <input type="checkbox"/>
n.	Has the Tenderer received a penalty or notice from the Environment Protection Authority or WorkSafe or been in breach of any other environmental, OH&S, safety or other legislation or regulations in the last 10 years?	<input type="checkbox"/>	<b>x</b> <input type="checkbox"/>
o.	The Tenderer acknowledges that PBA may undertake checks with EPA, WorkSafe or other regulators about its environmental, OH&S, safety, or other regulatory performance.	<b>x</b> <input checked="" type="checkbox"/>	<input type="checkbox"/>
p.	Does the Tenderer have any current investigations, notices, prosecutions, or enforcement action against it arising out of a possible breach of any environmental, OH&S, safety or other legislation or regulations?	<input type="checkbox"/>	<b>x</b> <input checked="" type="checkbox"/>
	If yes to above, provide details:		

### 9.3 Modern Slavery Questionnaire

The Tenderer warrants (tick appropriate box)			
The Tenderer warrants (tick appropriate box)		Yes	No
a.	Is your organisation obliged to report under the Australian Modern Slavery Act 2018 (Cth)?	<b>x</b>	<input checked="" type="checkbox"/>
b.	Does your organisation have policies or procedures in place to prevent or mitigate against modern slavery risks in your operations and supply chain?	<b>x</b> <input checked="" type="checkbox"/>	<input type="checkbox"/>
c.	Does your organisation internally monitor, record and report on compliance/noncompliance for Modern Slavery?	<b>x</b> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
d.	Do you monitor your suppliers, supply chain for modern slavery?  If yes, how do you select which suppliers should be monitored?	<b>x</b> <input type="checkbox"/>	

e.	Does your organisation have a person or team responsible for overseeing modern slavery risks (including keeping of records about contractors or suppliers) in relation to the materials, goods or services you propose to provide as part of PACIFIC BLUE AUSTRALIA's engagement with you?	x <input type="checkbox"/>	<input type="checkbox"/>
f.	Do you report on Modern Slavery to you Senior Leadership Group?	x <input type="checkbox"/>	
g.	Over the last 5 years of business, have you had any incidents of Modern Slavery occurring in your supply chain?  If yes, please provide a summary of the incident.	<input type="checkbox"/>	x <input checked="" type="checkbox"/>
h.	How much visibility does your organisation have over your supply chain? Please select one of the below and explain why you selected this option:  <input type="checkbox"/> <b>High:</b> You have mapped the full supply chain for key products and services used by your organisation and have identified key suppliers at all levels of your supply chain.  <input checked="" type="checkbox"/> <b>Moderate:</b> You have identified major Tier One suppliers and have partially or fully mapped the supply chains for key products and services of your supply chain.  <input type="checkbox"/> <b>Developing:</b> You have identified major Tier One suppliers. You have very limited or no visibility of your supply chains below the Tier One level.		
i.	Are staff in your organisation trained on how to identify, assess and respond to modern slavery risks?  If yes, please describe the nature of the training available and the positions or roles of staff that receive training. Please also specify whether training is also available to other organisations or staff in your supply chain. If no, does your organisation plan to introduce modern slavery risk training for staff?  <i>Modern slavery is managed by our Human Resources team. The company provides clear communication channels for employees to be able to raise any potential risks. Human resources team have external training material to ensure we are best prepared for any potential risks. Nothing has been raised on this topic since being founded in 2018. Supply chain training is not applicable to intelia.</i>	x <input type="checkbox"/>	<input type="checkbox"/>
j.	Does your organisation perform screening of all prospective suppliers to assess the risks of modern slavery or other human rights harms that may occur in its operations and supply chains?  If yes, please describe how your organisation performs this screening. If no, does your organisation plan to introduce measures to screen prospective suppliers for modern slavery risks in future?	<input type="checkbox"/>	N/A <input type="checkbox"/>



k.	How would your organisation respond to any allegation of modern slavery or substandard working conditions in its operations or supply chains?	<b>X</b>	

9.4 Lost Time Injuries  
Not Applicable

9.5 Workplace Relations  
Not Applicable

9.6 Insurance

Please provide details of insurance coverage, for each of the Tables listed below:

9.6 Insurance Details	
Public Liability Insurance	
Name of Insurer	Zurich Australian Insurance Limited ABN 13000296640 - 100%
Policy Number	03-ICT-I-0027085
Expiry Date	26/02/2025
Policy Amount (\$) Min \$20M	\$20,000,000

Professional Indemnity Insurance	
Name of Insurer	Zurich Australian Insurance Limited Insurance Australia Limited
Policy Number	03-ICT-I-0027085
Expiry Date	26/02/2025
Policy Amount (\$) Min \$5M	\$10,000,000 any one claim; \$20,000,000 in the aggregate

Subcontractor Worker Insurance	
Name of Insurer	Not applicable
Policy Number	
Expiry Date	

Policy Amount (\$)	
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Employee Liability Insurance	
Name of Insurer	Not applicable
Policy Number	
Expiry Date	
Policy Amount (\$) Min \$20M	

Worker Compensation	
Name of Insurer	Allianz
Policy Number	151693318
Expiry Date	30/06/2025
Policy Amount (\$)	\$2,600,000.00

Motor Vehicle Insurance	
Name of Insurer	Not applicable
Policy Number	
Expiry Date	
Policy Amount (\$) Min \$20M	

## 10. Conflict of Interest

### 10.1 Conflict of Interest Company Statement.

#### 10.1 Conflict of Interest Company Statement

The Tenderer states that it, and its partners, staff, sub-contractors and or consultants, do not have and are not aware of any actual or potential conflicts of interest which may arise between PACIFIC BLUE AUSTRALIA and the Tenderer.	
Registered Company Name	intelia Pty Ltd
Authorised Signatory	
Print Name	Joel Collins (CEO & Co Founder)
Date	27.09.24

## 10.2 Strategies for Managing Conflicts of Interest

Provide details of strategies for identifying, managing, and preventing conflicts of interest.

### 10.2 Strategies for Managing Conflicts of Interest:

intelia conducts training sessions to educate employees about potential conflicts and encourages them to be vigilant in identifying situations. This is part of their onboarding process.

Creating an open environment where employees feel comfortable discussing concerns or ambiguities regarding potential conflicts, without fear, is paramount to aiding the identification of potential conflicts early on. We also leverage regular consultant cadences as an opportunity for team members to discuss any potential conflicts of interest that they may be aware of.

Intelia has adopted the 4 D's to help deal with any conflicts of interest:

#### **Declare, Discuss, Deal and Document**

Early identification is key. Intelia promotes a culture of open communication, transparency and integrity. Ensuring that any potential conflicts of interest are raised and communicated to the appropriate parts of the business in the most efficient manner to minimise any detrimental impact to either party and ensure communication and declaration of the specific conflict(s) are declared, discussed together, dealt with and then documented for future reference.

We encourage transparency throughout the business. We promote an internal culture of transparency where all actions and decisions are documented and made accessible to relevant parties, thereby reducing the likelihood of hidden conflicts.

## 11. Financial Stability

### 11.1 Financial Questionnaire

#### 11.1 Financial Questionnaire

The Tenderer warrants (tick appropriate box)	Yes	No
--	-----	----

a.	Are there any significant events, matters or circumstances which have arisen since the end of the last financial year which may affect the operations of the Tenderer?		<b>X</b> <input type="checkbox"/>
b.	Are there any mergers or acquisitions that can be notified, either recent (within the past 12 months) or which are imminent?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
c.	Are there any court proceedings of any kind, actual or threatened, against the Tenderer, its parent or associated entities or any director of the Tenderer, its parent, or associated entities within the past 5 years?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
d.	Are there any insolvency or bankruptcy actions against the Tenderer, a director of the Tenderer, or its parent or associated entities within the past 5 years?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
e.	Are there any de-registration actions against the Tenderer, its parent, or associated entities within the past 5 years?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
f.	Are there any actions of insolvency proceedings, actual or threatened (including Voluntary Administration, Application to Wind Up, or other) against the Tenderer, its parent, or Associated entities within the past 5 years?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
g.	Are there any breaches of or defaults under any agreement, contract, order or award binding on the Tenderer, or its parent or associated entities?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
h.	Are there any other factors which could impact on the financial ability to successfully perform the contract? If yes, provide details	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
i.	Is the Tenderer trading insolvent, and unable to meet its debts as and when they fall due in the normal course of business?	<input type="checkbox"/>	<b>X</b> <input type="checkbox"/>
j.	Does the Tenderer agree to provide to PACIFIC BLUE or its nominated agent, if requested to do so, financial data concerning its business and related entities including?	<b>X</b> <input type="checkbox"/>	<input type="checkbox"/>
k.	Does the Tenderer agree to co-operate with an independent credit rating agency or other organisation during the conduct of financial assessments and reports?	<b>X</b> <input type="checkbox"/>	<input type="checkbox"/>

## 11.2 Financial Institutions Details

Please complete the section below, thereby authorising the Tenderer's financial institution to supply PACIFIC BLUE AUSTRALIA with a reference, as to its financial position.

The Tenderer warrants that they are financial stable to conduct business and there are no circumstances that would from stop trading solvently.

11.2 Financial Stability	
Registered Company Name	Bluebird Accounting

Authorised Accountant's Signatory	
Print Name	Julian Shimmin
Job Title	Partner
Date	26.09.24

## 12. Pricing Schedule

Please use the excel spreadsheet in Part e Attachment Pricing Schedule, any change to this format, may deem your submission non-compliant.

All rates are to be fixed for the term of the contract, GST exclusive and in Australian Dollars (AUD).

## 13. Contract Compliance

### 13.1 Contract Compliance

13.1 Contract Compliance	
Please indicate if you agree in principle to comply with the terms of the agreement	Tick Box
Comply fully with the proposed agreement	<input checked="" type="checkbox"/>
Comply with the agreement subject to departures/amendments	<input type="checkbox"/>

### 13.2 Contract Non-Compliance

*If you do not comply with the Contract, please list each clause and a reason why non-compliance, in table below.*

13.2 Contract Non-Compliance			
Clause No.	Clause Heading	Proposed departure/amendment	Reason for non-compliance