

Aqera - Oakley Capital Proposal

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Understanding Your Position

Where Oakley Capital Is Today

- A leading European mid-market PE firm with EUR 15B+ AUM across multiple fund vehicles, 80+ portfolio companies across Technology, Education, Consumer, and Business Services, and a twenty-year track record -- founded by Peter Dubens, headquartered in London with offices across Europe
- A portfolio that spans cybersecurity, CX, and data -- recent investments include Brevo (CX platform), Bridewell/I-TRACING (cybersecurity merger), Assured Data Protection, and IU Group (education technology)
- Portfolio-wide challenges -- AI governance across 80 companies, ESG compliance across 5+ jurisdictions, operational visibility into portfolio company performance, and cybersecurity standardisation
- A relationship network that is Oakley's single greatest intangible asset -- the founder and entrepreneur connections that have delivered uncontested deals sit fragmented across inboxes, CRMs, and personal networks

Managing 80+ portfolio companies across multiple countries creates compounding operational complexity: AI governance requirements per company, compliance obligations per jurisdiction (GDPR, SOC 2, EU AI Act), vendor risk across every portfolio company's supply chain, and no centralised visibility into operational health. Each portfolio company solves these problems independently -- duplicating cost and missing the leverage of portfolio-wide standardisation.

The Opportunity

Portfolio-Wide Governance as a Competitive Advantage

With 80+ portfolio companies across multiple jurisdictions, Oakley has the scale to benefit from standardised AI governance, compliance automation, and operational infrastructure across the entire portfolio.

Additional Platform Capabilities for Oakley:

The portfolio leverage: Every capability deployed to one portfolio company can be templated to all 80+. The marginal cost of the second deployment is near zero.

Aqera Bundle	Value to Oakley
COMPLY -- Prove It	Automated compliance evidence across entire portfolio. GDPR, SOC 2, EU AI Act mapped per company. Each portfolio company gets compliant faster -- reducing risk and increasing exit readiness.
OPERATE -- Run It	Standardised operational infrastructure for newly acquired companies. Integrations, workflows, and knowledge management deployed from a template rather than built from scratch each time.
OPTIMISE -- Spend Less	AI cost visibility across portfolio. Friction Score per portfolio company identifies operational bottlenecks. Data & Reporting provides portfolio-wide analytics and performance benchmarking.
MANAGED -- We Do It	TPRM for supply chain risk across all portfolio companies. Security Operations for cybersecurity standardisation. Managed pods deploy into portfolio companies for hands-on delivery.

Capability	Value
Trust Center	Each portfolio company gets a public compliance portal -- accelerating their own enterprise sales by showing prospects their AI is governed
Vendor Risk Management	Central visibility into vendors across all portfolio companies -- identify concentration risk, enforce standards, and reduce supply chain exposure
Relationship Intelligence	AI-powered scoring of Oakley's twenty-year founder network -- systematise deal sourcing, cross-portfolio introductions, and LP reporting
Visual Workflow Builder	Standardised governed workflows deployed across portfolio companies for onboarding, compliance, and operational procedures

What We Propose

A Three-Phase Engagement

Phase 1	Phase 2	Phase 3
Assessment & Data Audit	Platform Build	Managed Operations
Weeks 1-4	Weeks 5-16	Ongoing
Understand ->	Build ->	Run & Grow

Each phase has clear deliverables, defined costs, and measurable outcomes. You approve each phase before the next begins.
No lock-in. You own everything we build.

Phase 1 - Assessment & Data Audit (Weeks 1-4)

What We Do

- Audit Oakley's relationship data - across CRMs, email systems, deal management tools, and personal databases used by the deal team and partners. Assess structure, quality, completeness, duplication, and coverage across your four sectors
- Score data readiness for AI - evaluate which data is ready for relationship scoring and pattern recognition today, and what needs enrichment
- Map monetisation opportunities specific to Oakley - prioritise use cases by impact: deal sourcing intelligence, portfolio company value-add, LP reporting automation, cross-portfolio network effects
- Review India team deliverables - evaluate what's been built, what's useful, what needs replacing, and where the cost-to-value gap is widest
- Identify quick wins - changes that deliver value in days, not months (e.g., deduplication, relationship graph visualisation, basic scoring on the existing dataset)

Oakley Data Monetisation Roadmap - A prioritised, costed plan showing exactly how Oakley's twenty-year relationship network becomes a systematised intelligence asset that strengthens deal sourcing, portfolio operations, and LP reporting across all active funds.

£12,000 (one-off)

Phase 2 - Platform Build (Weeks 5-16)

What We Build

Every component is governed by the Aqera Platform - meaning every action, every data access, every AI decision produces an auditable evidence trail. For a firm managing ?10B+ across nine funds with institutional LPs, data governance and compliance are non-negotiable. Aqera makes them automatic.

£15,000/month for 4 months (£60,000 total)

Component	Description
Cloud Data Platform	Secure, scalable infrastructure consolidating Oakley's fragmented relationship data into a single source of truth - designed for a firm operating across London, Munich, Milan, Madrid, and Luxembourg
AI-Powered Relationship Scoring	Intelligent scoring of every contact by deal relevance, founder relationship strength, sector alignment, geographic coverage, and engagement recency - tailored to Oakley's Technology, Consumer, Education, and Healthcare sectors
Proprietary Deal Sourcing Engine	Map connections between founders, advisors, and intermediaries. Identify warm introduction paths to target companies. Surface patterns that predict deal flow - systematising the information asymmetry of deal sourcing
LP/GP Reporting Automation	Automated report generation across Fund IV, V, VI, Origin I, and Origin II from live relationship and portfolio data - quarterly reports in minutes, not days
Portfolio Intelligence API	Secure API enabling Oakley's portfolio companies to access curated, relevant relationship intelligence - introductions, market signals, and partnership opportunities specific to their sector and growth stage
Dashboards	Real-time visibility into network value, deal pipeline signals, relationship health, cross-portfolio connections, and monetisation metrics

Phase 3 - Managed Operations (Ongoing)

What Ongoing Management Looks Like

- Relationship data enrichment - continuous cleaning, deduplication, and enrichment of Oakley's contact and relationship data as the network grows through new deals, events, and portfolio company interactions
- AI model tuning - improving deal sourcing predictions, relationship scoring accuracy, and cross-portfolio matching as more data flows through the platform
- New capability development - building new features as Oakley's needs evolve (e.g., co-investor intelligence, sector-specific deal signals for Education or Technology verticals, integration with Oakley's AI Forum initiatives)
- Platform monitoring and support - proactive monitoring, incident response, uptime management across all five office locations
- Monthly insights reporting - platform performance, data quality trends, deal sourcing attribution, and portfolio intelligence utilisation metrics

Your Aqera pod takes over platform management entirely. No more managing offshore timezones, quality issues, or communication gaps. Your IT Director shifts from managing an outsourced team to overseeing a strategic intelligence platform that directly supports Oakley's investment activity.

£10,000-£15,000/month depending on scope

Your Aqera Pod

Small Team. Big Output.

3-4 people delivering what currently requires 8-10 in India - because every team member is augmented by AI tooling that automates the repetitive work.

- Your Pod Lead doesn't write boilerplate - AI generates it, they review and refine
- Your Data Specialist doesn't clean data manually - AI pipelines handle deduplication, enrichment, and normalisation
- Your Ops Support doesn't watch dashboards - AI monitors and alerts

Result: Senior-quality output at a fraction of the headcount. The IT Director manages one UK-based Pod Lead, not a distributed offshore team.

Role	Location	Responsibility
Pod Lead	UK	Senior data/platform engineer. Your single point of contact. Owns architecture, delivery, and stakeholder communication. Understands PE workflows.
Data Specialist	UK/Nigeria	Data engineering, AI model development, pipeline management. Builds and tunes the relationship intelligence engine - scoring, pattern recognition, deal flow signals.
Ops Support	Nigeria	Data quality monitoring, platform operations, incident response. Keeps everything running across all Oakley office timezones.
AI/ML Specialist	As needed	Brought in for specific AI model development - relationship scoring algorithms, deal sourcing pattern recognition, cross-portfolio intelligence matching.

Technology Stack

What Gets Built

+-----+
| Oakley Dashboards |
| (Network value, deal signals, LP reports, |
| cross-portfolio intelligence) |

+-----+
| Portfolio Intelligence API |
| (Secure access for ~30 portfolio companies) |

+-----+
| AI-Powered Intelligence Layer |
| (Relationship scoring, deal sourcing, |
| founder matching, cross-portfolio links, |
| LP report generation) |

+-----+
| Data Platform |
| (Cloud infrastructure, data pipeline, |
| storage, security, multi-office access) |

+-----+
| Aqera Platform |
| (Governance, compliance, evidence chain, |
| analytics, monitoring) |

- +-----+
- Cloud-native - GCP or AWS, your choice, no vendor lock-in
 - Governed - every data access and AI decision produces auditable evidence, critical for a firm with institutional LP obligations
 - Compliant - built with GDPR and data protection requirements from day one, essential for pan-European operations across five jurisdictions
 - Multi-office ready - designed for Oakley's distributed team across London, Munich, Milan, Madrid, and Luxembourg
 - Owned by you - all code, data, and infrastructure is yours. If Oakley ever wants to bring it in-house or hand it to another provider, you walk away with everything

What We Replace

Current State vs. Aqera

Better outcomes. Lower cost. UK-based leadership.

You stop paying for bodies doing basic IT work and start paying for a strategic intelligence platform that directly strengthens Oakley's deal sourcing, portfolio support, and LP experience - the three things that drove a near-100% re-up rate and a ?4.5B Fund VI close.

Current (India Team)	Aqera Pod
Monthly Cost	£15,000-£25,000 (estimated)
Team Size	8-10 people
Leadership	Offshore, timezone-delayed
Output	Basic development, reactive
Data Monetisation	None
Deal Sourcing Support	None
Portfolio Value-Add	None
LP Reporting	Manual, time-consuming
Governance	Ad hoc
Knowledge Retention	High turnover risk
Communication	Through IT Director, async

Timeline

From Engagement to Value

Week 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17+

+-----+

Phase 1: Assessment & Data Audit
Deliverable: Oakley Data Monetisation Roadmap

+-----+

Phase 2: Platform Build

+-----+

Core data platform + relationship scoring (first value)

+-----+

Deal sourcing engine + LP/GP automation

+-----+

Portfolio Intelligence API + dashboards

+---->

Phase 3
Managed Ops

First value delivered in 6-8 weeks - relationship scoring and basic deal sourcing intelligence live and usable by Oakley's deal team.
Full platform operational by week 16 - all capabilities live across deal sourcing, portfolio intelligence, and LP reporting.

Investment

Summary

- Current India spend: £180,000-£300,000/year for basic IT work with zero data monetisation or deal sourcing support
 - Opportunity cost: Every month Oakley's relationship data sits unmonetised, the information asymmetry that drives uncontested deals erodes - competitors with better data infrastructure close the gap
 - Alternative: Building in-house would require 3-4 senior hires (£300,000-£500,000/year) plus 12+ months to reach the same capability - and Oakley has no internal IT team to manage them
 - Context: At ?10B+ AUM, even a 1% improvement in deal sourcing efficiency or portfolio EBITDA growth (currently averaging 15% p.a.) dwarfs the entire cost of this engagement
- Aqera delivers more, for less, faster.

Phase	Duration	Cost
Phase 1: Assessment & Data Audit	4 weeks	£12,000 (one-off)
Phase 2: Platform Build	4 months	£15,000/month (£60,000 total)
Phase 3: Managed Operations	Ongoing	£10,000-£15,000/month

Scenario	Year 1 Cost
Conservative (Phase 3 at £10,000/mo)	£132,000
Full scope (Phase 3 at £15,000/mo)	£192,000

What We Need From Oakley

To Get Started

- You don't need to hire anyone
- You don't need to manage our team
- You don't need to change your day-to-day deal workflow
- You don't need to understand the technology - your IT Director and Pod Lead handle that
- You don't need to restructure your India team immediately - we can run in parallel during transition

Requirement	Who	Time Commitment
Access to relationship data (CRMs, deal databases, email ex	IT Director	One-time setup
IT Director as technical stakeholder	IT Director	2-3 hours/week during Phase 1-2, 1 hour/week ongoing
Deal team input	Partners/Associ	2 hours/week during Phase 1 (to define scoring criteria, deal sourcing priorities, and portfolio value-add requirements), ad hoc thereafter
Data governance decisions	Partners	Key decisions on data sharing policies, privacy boundaries, and what relationship intelligence is appropriate to surface to portfolio companies vs. keep

Why Aqera - For Oakley

What Makes This Different

Built for PE Portfolio Operations - Aqera is designed for the PE operating model: standardised governance deployed across a portfolio, not a single-tenant enterprise tool. Each portfolio company gets a template of the platform, configured for their jurisdiction and compliance requirements, with Oakley retaining portfolio-wide visibility.

UK-Based Leadership - Your Pod Lead is in the UK, working your hours, understanding your context. No offshore black box. No timezone delays. For a firm where relationships define the thesis, the people building your operational infrastructure should have a relationship with you.

AI-Native Delivery - Every team member is augmented by AI. A 4-person Aqera pod delivers what traditionally requires 10-15. Vendor Risk Management, Trust Center, and compliance evidence are automated by the platform -- pods focus on strategic configuration and portfolio-specific customisation.

Evidence-Backed Everything - Every action produces auditable evidence. Compliance posture per portfolio company is always current. Trust Centers provide instant proof to each company's prospects. Vendor risk is monitored continuously, not assessed annually.

Portfolio-Wide Visibility - Oakley gets a portfolio dashboard: compliance status per company, Friction Score per company, vendor risk concentration, AI cost allocation, and operational health -- all from a single platform.

Aligned with Oakley's Cybersecurity Thesis - With investments in Bridewell/I-TRACING, Assured Data Protection, and a growing cybersecurity portfolio, Aqera's Security Operations Center and governance framework complement Oakley's existing expertise. The platform Oakley deploys internally can become a value-add offered to cybersecurity portfolio companies.

Next Steps

Getting Started

Step 1	Step 2	Step 3
30-Minute Discovery Call	Data Audit Proposal	Engagement Letter
Understand Oakley's relationship data landscape, IT setup, deal sourcing priorities, and portfolio intelligence goals.	Tailored Phase 1 scope based on discovery call findings.	Formal agreement and project kickoff

This week -----> Next week -----> Week after

Aqera
[Contact Name], [Title]
[Email]
[Phone]
A company built on AI.

This document is confidential and intended solely for Oakley Capital. All pricing is indicative and subject to final scoping.