

Open tender

West Midlands Growth Company

Foreign Direct Lead Generation - Australia

**Tender code – 2019-WMGC-
FDLGAU**

September 2019

West Midlands Growth Company

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**West Midlands
Growth Company**

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SECTION ONE – tender information

This document contains:

(1) Contract information - for reference only

Project aim

(2) Tender specifications

- Project briefing

(3) Tender process and evaluation

- You will need to respond to the requirements listed, considering the evaluation criteria specified and
- You will need to respond via the process and within the timelines as indicated

1.1 Background

The West Midlands Growth Company (WMGC) is helping to create new jobs, expand existing businesses and attract new businesses and investment to the region, aligned to the ambitions set out in the West Midlands Combined Authority (WMCA) Strategic Economic Plan.

The WMGC is owned by the WMCA and its Constituent Members, with governance that heavily involves the private sector in the majority. Its core WMCA and local authority funding will be used to attract significant additional funding from the private sector and other sources, such as future Devolution Deals.

The tender is for a two-year contract (subject to annual review after year one) and is based on inward investment lead generation for the West Midlands area which covers the geography of the West Midlands Combined Authority (WMCA) which includes the three Local Enterprise Partnership (LEP) areas of: Greater Birmingham and Solihull, Black Country, and Coventry and Warwickshire. This includes the cities of Birmingham, Coventry and Wolverhampton.

This tender is to support promotion of the West Midlands as an inward investment location, to generate a qualified investment lead pipeline and aligns strategically to the following:

- West Midlands Local Industrial Strategy
- West Midlands Inward Investment Strategy

The West Midlands Local Industrial Strategy (LIS) published in May 2019 highlights four major market driven opportunities for the region as: Future of Mobility, Data-driven Health and Life Sciences, Modern Services (business and professional services) and Creative Content, Techniques and Technologies.

The West Midlands Inward Investment Strategy supports the objectives of the LIS and outlines how the region will attract increased levels of investment by promoting the competitive strengths and assets of the West Midlands internationally and nationally, capitalising on market-driven opportunities, delivering an increase in both the volume and value of jobs to the region. This additional investment will support the region's ambition to deliver inclusive growth across the whole WMCA area.

The strategy recommends a programme of proactive promotion and internationalisation for a range of key sectors aligned to the LIS key market opportunities above, targeting core international markets specific to these.

This tender is to promote the West Midlands region for foreign direct investment (FDI) lead generation in **Australia** covering strategic locations and sectors. WMGC will supply relevant proposition materials, which would include as a minimum:

- Sector information, market opportunities and local capabilities
- Labour market and other statistical information
- Quality of life
- Key sites and property information
- Case studies

West Midlands Growth Company acts as a single point of contact for inward investment clients, bringing together a project team from relevant organisations such as property agents, recruitment consultants, public agencies and universities to deliver a comprehensive package of support.

Introduction to the West Midlands

As mentioned, the West Midlands covers the geography of the West Midlands Combined Authority (WMCA) which includes the three Local Enterprise Partnership (LEP) areas of: Greater Birmingham and Solihull, Black Country, and Coventry and Warwickshire. This includes the cities of Birmingham, Coventry and Wolverhampton. The area is located strategically at the centre of the UK, with 90% of the UK's population within 4 hours drive or train time. Served by Birmingham Airport, the UK's fastest-growing airport, local connectivity is being enhanced by a £5.1 billion investment to expand local rail, tram and bus rapid transit systems. High Speed Two (HS2) is the largest infrastructure project in the UK currently and when completed will link the region with London in just 38 minutes. HS2 will increase capacity and bring people and goods to and from London and other major UK cities much faster.

The region is home to one of the youngest populations in Europe, with 32% under the age of 25 and with 8 leading universities, the region educates 160,000 students and produces more than 55,000 graduates each year. The region is already home to the UK's most entrepreneurial city outside of London.

The West Midlands' economy is deeply rooted in innovation, and today a golden thread of technology has positioned the region as a leader in industries of the future.

The West Midlands has been selected to become the innovative home to the UK's first multi-city 5G test bed.

The West Midlands offers a vibrant leisure scene and a high quality of life that makes it the most popular place in the UK for the country's relocating residents. Coventry is set to become the UK's 2021 City of Culture, and Birmingham will host the 2022 Commonwealth Games, putting the region in the global spotlight, while Wolverhampton is buzzing as its football club challenges the very best in the Premier League.

The region is consistently the second highest performing region for Foreign Direct Investment (FDI) in the UK after London and the south east. It is home to major investors such as Jaguar Land Rover, Mondelez, Rolls-Royce, BMW, Siemens, Fujitsu, Collins Aerospace, HSBC and Deutsche Bank.

West Midlands Growth Company provides the following support to inward investors:

- Relocation and expansion business case development
- Benchmark against other potential investment destinations
- Location & labour cost analysis
- Solutions to training & recruitment support
- Information on access to finance
- Showcase of the commercial real estate available and short listing
- Introductions to local support partners & programmes
- Introductions to R&D centres of excellence & academia
- Brokering introductions into the Greater Birmingham business community
- Tailored familiarisation visit programmes
- PR and Communications
- Investor development support programme

The list of activities above is not exclusive.

www.wmgrowth.com

1.2 Project aims

1.2.1 Aims

The aim of this project is to appoint a supplier for inward investment lead generation to the West Midlands Growth Company aimed at securing inward investment projects and new direct jobs created from these businesses from Australia. The lead generation activity will be fully aligned with West Midlands Growth Company's strategic direction and will target potential investors for the West Midlands.

Geographically targeted within this to appropriate areas of Australia (principally states of New South Wales, Queensland and Victoria) with specific lead generation activity focussed on prioritising:

Creative and Tech:

- Gaming to include serious gaming

- VR and AR

Modern Business Services:

- Business, professional and financial services
 - Banking and finance
- FinTech

Data-driven Healthcare:

- Medical technologies including medical devices and diagnostics

The above are considered priority sectors with opportunities from this geographic market within the budget available. However, lead generation more reactively can also be considered from other priority and secondary sectors including for example, food technology, energy storage and construction technologies, and other digital tech opportunities within Creative and Tech.

The project will also create or build on any existing FDI pipeline in the designated territory of Australia.

The list of target geographies and sectors is by no means exclusive.

In this programme, West Midlands Growth Company will strategically target potential investment of both small to medium-sized enterprises (SMEs) and larger enterprises.

1.2.2. Objectives

- The appointed supplier will take on the role of West Midlands Growth Company's strategic business development partner and front end sales partner in inward investment lead generation in Australia, which will ultimately result in new foreign owned investment and jobs in the West Midlands.
- In addition, the role will involve providing strategic in-market support to the West Midlands Growth Company team.
- The appointed supplier will also work closely with West Midlands Growth Company's strategic partners (e.g. Department for International Trade post teams) where appropriate, including any targeting of parent companies of existing UK subsidiaries in the West Midlands for expansion projects. The supplier is strongly encouraged to use their market knowledge in order to identify new geographic and market opportunities for the West Midlands.
- After identification of a potential investor, the lead generation agency will represent WMGC to the client providing excellent customer care and support throughout the customer journey until the project is handed over to a member of the WMGC team for completion.
- The lead generation agency will attend selected trade events and support the WMGC team with targeted meeting programmes at both local and international trade events.

- The appointed supplier will provide relevant market intelligence and research on trends and developments in order to maximise WMGC's presence in the market geography.
- WMGC wishes to increase its brand profile and raise awareness of the opportunities in these particular sectors in Australia as a place to do business. We will therefore require the appointed supplier to contribute to our marketing strategy.
- The appointed supplier will provide a high level of account management to potential investors, and detailed, regular reports to WMGC.

1.2.3. Measurable Outputs (see Definitions below for clarification of terms over 2 years)

- Build a pipeline of minimum 40 prospects and minimum 20 projects
- Supporting 5 inward investment visits to the West Midlands region (Project Area)
- Create 3 completed projects (successes) with 45 jobs.

Australia		Year 1	Year 2	Total
Base Contract	Prospects	20	20	40
	Projects	10	10	20
Target Achievement	Client visits to the region	2	3	5
	Successes	1	2	3
	Job Created	15	30	45

NOTES:

Projects including successful projects will be counted towards measurable outputs on CRM submission only.

Please note, for projects sourced by the appointed supplier, securing the successful investment would be delivered in conjunction with the WMGC team and is therefore a shared target output.

1.2.4 Duration

The contract will run from 14th October 2019 to 30th September 2021, please note the second year of the contract commencing 1st October 2020 is subject to a satisfactory review in September 2020.

1.2.5 Value

The total anticipated maximum value of this contract is £50,000 over 2 years (£25,000 maximum per year) excluding VAT

Approximately 30% of the contract value is based on target achievement of project outputs as detailed in 1.2.6

On receipt of confirmation evidence, payment per deliverable, to a maximum value as detailed in the table below, will be as follows:

- Client (Inward) visit £1,000 each
- Successes (completed project) £1,500 each
- Jobs created £300 per job*

Australia	Base Contract	Target Achievement	Total
Year 1	£17,000	£8,000	£25,000
Year 2	£14,500	£10,500	£25,000

*Please note payment on this deliverable is capped at the target achievement number for year 1 across both years of the contract.

1.2.6 Payment Schedule

The total contract value is to include **all costs** related to delivering the agreed lead generation sales and marketing plan and activity to achieve required outcomes including, but not exclusive to: management, service, research, travel, accommodation, subsistence, event attendance and other expenses. It is expected that the supplier bid will contain a fixed element and a forecasted element for other expenses – please note that the sums payable to the successful tenderer cannot exceed the original quote in the submission bid.

1.2.7 Expenses

Tenderers should note that if the bid proposal submitted includes any element of expenses that sit outside of their fees quoted e.g. travel, parking, accommodation, subsistence, event/trade show attendance and other expenses, then it is a condition that at the time of submission of invoices the successful supplier **MUST** provide actual receipts and a description detailing the purpose to be achieved in relation to this contract. West Midlands Growth Company will not reimburse such expenditure without the evidence required.

Suppliers should divide their costing proposal into budget headings i.e. fees and expenses (if applicable). The total maximum amount claimable is that of all budget headings added together. Suppliers can move amounts within budget headings with the prior approval of West Midlands Growth Company, however the total maximum amount cannot be exceeded (i.e. Fees + expenses = Total maximum cost)

SECTION TWO – tender specification

2.1 Description of requirement

The purpose of the project is to reach and qualify companies looking to capitalise on market opportunities presented by **locating or expanding** in the West Midlands area. Activity should ideally be based on engagement with businesses with sufficient growth potential to yield 15 new jobs per project.

2.1.2 Definitions

Foreign Direct Investment (FDI)

In line with the international definitions, WMGC recognises all modes of entry for FDI:

- New (“Greenfield”) FDI
- Expansion FDI
- Mergers and Acquisitions (M&As) and Joint Ventures

Additionally, to be considered as an FDI project, the following questions must be answered with ‘yes’:

- Will there be a new, additional financial investment in the UK foreign direct enterprise as part of the FDI project?
- Will the investment make or retain the foreign investor the owner of at least 10% of the voting power in the UK foreign direct enterprise?
- Are the business activities supported by the investment project expected to last at least 3 years?
- Will the new investment directly create 1 or more new permanent (i.e. expected to last for at least 2 years) jobs in the UK?

This tender focuses on three stages of the FDI project process with evidence requirements for ‘Completed Project’ and ‘Jobs Created’:

Prospect

This is the point at which:

- The investor has clearly indicated their intention to invest or expand their activities either in the UK or abroad

- Key characteristics of the potential investment activity, such as the investment type, mode of entry, business nature, sector and source market are all known and have been recorded on WMGC CRM system. These will be recorded by the supplier and training will be provided.
- The investment opportunity meets the key eligibility criteria for FDI projects as defined above

Project

A prospect becomes a project when the following criteria have been met:

- The investor has stated that they are definitely interested in investing in the UK (either solely or as one of a number of potential locations);
- An indicative decision date for investment has been provided and the expected date for the start of the actual business activity is normally within the next 12-18 months
- The investor gives an indication of the number of anticipated new jobs associated with the investment
- All data entered at Prospect stage has been reviewed, updated and verified by WMGC
- There is a clear client requirement and a need for a bespoke response. Sufficient evidence of the client's requirement has been provided by completing the relevant section on the CRM and the client requirement has been discussed and agreed with WMGC
- The project meets the key eligibility criteria for FDI projects as defined above

Completed Project

There is sufficient evidence (e.g. receipt of a confirmation letter from the investor) that the final investment decision has been made, the value of the capital investment is known, the investor has started the implementation of the investment project and that the UK company is registered.

Jobs Created

The total number of permanent new jobs to be created in the contract area geography during the first three years of the completed project, supported by written evidence / confirmation from the investor.

Client (Inward) Visit

This is where the inward investment client shall make a visit to the West Midlands area for the purpose (either fully or partially) as part of an evaluation of the location for inward investment or business expansion purposes. This may involve a regional familiarisation programme consisting of site/ property tours, meetings with WMGC, commercial partners, related technology centres of excellence or other organisations qualified as part of this process, or anything else deemed appropriate where the supplier with WMGC provides support for such a visit. The visit should be qualified by the supplier or WMGC for this purpose. Each visit should be by a different company.

2.1.3 Project Outputs – Australia

- Attend selected business development activities including trade events and support West Midlands Growth Company with meeting programmes.
- Progression in the sales process to:
 - Generate awareness of the benefits of establishing a presence in West Midlands
 - Lead the target business to seriously consider West Midlands as a location
 - Identifying and removing any barriers or objections to West Midlands as a location
 - Work with the West Midlands Growth Company team to secure new investment or expansion projects
- Attend and support organisation of WMGC sales missions. We expect the supplier to attend and support a minimum of 1 per year of the contract period/ overall contract term of the contract period.
- Supporting the investment client to committing to a qualified inward visit to the region (minimum levels indicated in the outputs table) where each visit is by a different company.

2.2 Project Management

The project will be managed by David Fiskin, Head of Business Attraction and Karolina Kuszowska, Senior Business Development Executive. The contractor will be required to meet as agreed at the inception meeting or by teleconference.

Meetings/calls shall be held on a monthly basis between the supplier and key personnel from West Midlands Growth Company. These meetings/calls shall be held to review progress in the provisions of the Services against the Supplier's tender and any identified timescales.

A monthly report including pipeline review and progress against objectives and measurable outputs will be required, followed by monthly calls with assigned West Midlands Growth Company project managers. These will cover particular prospects and projects, as well as strategic planning for the following month. In addition to this, an annual report will be required. An annual review will be conducted via a conference call at the beginning of October 2020.

At the end of the contract period, any pipeline data created as a result of the project will remain the property of WMGC and must be returned to WMGC in an acceptable format (e.g. Excel spreadsheet).

2.3 Confidentiality

West Midlands Growth Company would expect to have free use of all data, and all intellectual property rights to the deliverables produced and assigned to West Midlands Growth Company. The outputs of this project must be kept strictly confidential and they cannot be shared with any third party without written permission from West Midlands Growth Company.

The tender documentation is commercially sensitive and will be kept strictly confidential. Under no circumstances can information be passed on to any third party without permission from West Midlands Growth Company.

2.4 Freedom of Information

Tenderers should note that the Employer may be required to disclose information that Tenderers provide to the Employer under the Freedom of Information Act 2000 unless the Employer can establish either that the information is subject to a duty of confidence or that it is both commercially sensitive and the public interest in maintaining its confidentiality is greater than the public interest in disclosing it.

2.5 Conflicts of Interest

Contractors will be expected to manage conflicts of interest between WMGC and any competitors or partners that the contractor works with or becomes a representative of. To ensure that these conflicts of interest are managed effectively, tenderers are asked to supply

a detailed methodology setting out how they will manage any conflicts of interest that arise. This will be evaluated as part of tender submissions.

Should at any point during the duration of the contract any framework contractor becomes a representative of a competitor or partner of WMGC, that contractor will be required to inform WMGC and act in accordance with the agreed methodology. If the contractor fails to successfully manage any conflicts of interest, then WMGC may choose to terminate the contract.

2.6 Sub-contracting

Whilst it is the preference of WMGC that no sub-contracting is involved in this project, we appreciate that it may be necessary to successfully fulfil the project aims. The Supplier may sub-contract delivery of the Services with the prior consent of the Client.

If you are sub-contracting, please ensure you complete appendix B in full.

SECTION THREE – tender process and evaluation

3.1 Response requirements

A proposal is required that includes the following:

Selection Criteria:

- a) Completion of:
 - Organisation identity (Appendix A)
 - Bidding model (Appendix B)
 - Financial viability (Appendix C)
 - Financial and Technical capability (Appendix D)

- b) Relevant case studies demonstrate your expertise in delivering similar projects – please complete Appendix D

- c) Information on the account team relevant to the case studies including:
 - Focus of work
 - Relevant skills and expertise

Response Requirements for Award Criteria:

- a) Details of all stages of your proposed approach and methodology to meet the requirements in section 2.
- b) Details of the resources & expertise to be assigned to this project

- c) Total Costing breakdown to also include any forecasted expenses outside the staff costs e.g. travel and gift vouchers. (Actual receipts to be provided by winning supplier)

All information to be supplied in English.

Please note the award of this tender will be based solely on bid submission. There will be no additional interviews taking place.

3.2 How do we select from the responses received?

We will check and evaluate each submission and rank contractors according to the following criteria, with the tenderer receiving the highest overall score being awarded the contract:

3.2.1 Selection Criteria

a) Completion of:

- Appendix A – Company Information – for information only
- Appendix B – Bidding Model – for information only
- Appendix C – Financial Information – self certify
- Appendix D – Technical and Professional Ability – pass/fail

b) Financial Stability – marked pass or fail – this evaluation will ONLY be conducted on the winning supplier – for the purposes of tendering, suppliers to self-certify that they will provide the information detailed in Appendix C should they be successful. – Please complete Appendix C. Financial stability is evaluated by looking at the following: -

- a. **Current ratio** – Solvency – (calculated by current assets / current liabilities).
Pass if ratio is greater than or equal to 1; Fail if ratio is less than 1.
- b. **Gearing ratio** – Equity-Debt ratio (calculated by long term debt / equity and reserves). Pass if ratio is less than or equal to 1; Fail if ratio is greater than 1.
- c. **Interest cover** – Ability to fulfil short-term obligations to borrowers (calculated by profit before tax / interest payable). Pass if ratio is greater than or equal to three times; Fail if less than three times.
- d. **Adequacy of the reserves** – Looking at Profitability versus the depletion of reserves – for information only

The evaluation panel will approach each Tenderer consistently, and will make a decision based not on one but all of the above criteria / information. Therefore, this does not necessarily mean that failing one of the above criteria will result in a “fail”.

c) Technical and professional ability required – marked pass or fail based on your ability to demonstrate expertise and experience relating to undertaking visitor surveys of a similar nature in delivering similar projects in the last three years. A total score of 6 is required to pass. See Appendix D.

If submitting as a business consortium, please provide min 1 case study demonstrating previous work as a consortium (can be with a different partner than the one you're partnering with in this bid submission), additionally provide min 1 case studies from each partner in this business consortium demonstrating experience relating to the requirement.

If submitting a bid including sub-contracted delivery please provide min 1 case study demonstrating previous work with the subcontractor (can be with a different sub-contractor than the one you will be using in this bid submission), additionally provide min 1 case studies demonstrating experience relating to the requirement.

Only those suppliers passing the above selection criteria will proceed to having their bid proposal evaluated against the below award criteria response requirements

3.2.2 Award Criteria – see Appendix G for marking schedule

Methodology & approach- weighted **[70%]** and assessed against the following:

- Tell us how you plan to deliver the works taking into account specific outputs of the project as listed under section 2 **(30%)**
- Please provide a detailed methodology of how you will achieve the required measurable outputs as listed under section 2. **(20%)**
- Please provide information about what resources you will put to the project and how you will manage these to meet the project deadlines **(10%)**
- How relevant, robust and realistic is the proposed approach to assess key specifications as listed under section 2. and specific outputs of the project as listed under section 1 **(10%)**

a) Resources & expertise - weighted **[20%]** and assessed against the following:

- Please provide information about what staff resources you will put into the project, including the mix of senior and junior staff in the table below, and how you will manage these to meet the project deadlines. Please also provide a breakdown of all direct staff costs, including daily rates for senior and junior members of staff including overheads.
- Please detail the expertise of staff that will be working on this project, evidencing relevant work that they have completed previously. If third parties being used, we will also need this detail from them

b) Price - weighted **[10%]** and evaluated as follows:

The quote should include all direct staff costs including breakdowns of senior and junior members of staff's daily rate and overheads. General costs related to projects will be expected to be absorbed within the rates quoted e.g. photocopying, travel to meetings, computing resources. Please itemise any costs that you consider to be outside of these rates.

The evaluation panel will score the financial proposals for each bid in accordance with the following methodology:

- **10%** - Total fixed cost price for undertaking the work set out in the pricing return (P1) shall be scored by comparing this with the lowest fixed cost price submitted by any tender (Z1) as follows

Score = Z1/P1 x 10

NB - West Midlands Growth Company shall rely on the information provided by the quoting provider. A material misrepresentation contained therein shall constitute a material breach of contract.

3.3 Process and timescales

This timetable is indicative only. West Midlands Growth Company reserves the right to change it at its discretion.

Milestone	Deadline and process
Brief stage	
Brief & task	West Midlands Growth Company to issue open tender brief via appropriate invitation to tender websites by 16-09-19 .
Response deadline	Companies must respond to tender brief requirements and submit their proposal to be with West Midlands Growth Company no later than 12:00 noon BST on 04-10-19 .
Submitting your tender	<p>The West Midlands Growth Company tender process is outlined below. Failure to work in accordance with the deadlines outlined in the tender submission process will lead to automatic dismissal of application.</p> <p>Stage 1 – Express interest</p> <p>All suppliers must visit and register interest via the In-Tend system prior to submitting the tender.</p> <p>https://in-tendhost.co.uk/wmgrowth.aspx/Home</p> <p>Once you have expressed interest, the tender bid will be available to download from the “Brief Stage” tab. We recommend that you familiarise yourself with the submission process on the website prior to the submission deadline.</p> <p>If you are experiencing any technical difficulties or require any help, you should contact West Midlands Growth Company at the earliest possible point prior to the deadline in order to resolve any issues.</p>

	<p>Failure to communicate with us prior to the deadline will result in your company being removed from the procurement process.</p> <p>Telephone 0121 202 5115 – please quote the tender reference number.</p> <p>Stage 2 – Identify and submit questions</p> <p>Please submit any questions to WMGC via its In-Tend system by no later than 12:00 noon BST on 24-09-19. This should be done as a correspondence message on the system.</p> <p>To ensure a fair and transparent process, any questions sent past this deadline will not be answered. The company will endeavour to answer all questions by the end of 25-09-19. Responses will be shared with all prospective Tenderers via the Correspondence method and Clarifications Tab on In-tend.</p> <p>Stage 3 – Submit tender</p> <p>The final tender MUST be submitted as an electronic copy via the In-Tend system to West Midlands Growth Company. Failure to submit will result in your company being removed from the procurement process.</p> <p>(A) E-Procurement</p> <p>All suppliers must visit our e-Procurement system (In-Tend) to register and submit the tender.</p> <p>https://in-tendhost.co.uk/wmgrowth.aspx/Home</p> <p>Suppliers should note that there is a maximum file upload size of 5mb per document to the 'In-tend' website and where you have a large number of documents or documents which are close to the 5mb file size limit, you MUST ensure you allow plenty of time to upload your submission prior to the deadline for tender submission.</p>
Evaluation stage	
Expected date of evaluation	All responses will be evaluated against pre-identified criteria by the project management team by 11-10-19 .
Expected date of notification of successful tender	Notification of successful tender will be made and the successful company will be notified by 14-10-19 .

Expected date of appointment and project initiation

14-10-19. A project initiation meeting will be held as soon as possible on/after this date.

3.4 Tender Queries

Tender queries must be submitted via the In-Tend system at the website specified above before the deadline specified above. The tender manager will coordinate any responses.

West Midlands Growth Company will issue response to any tender queries to all tenderers through In-Tend. In the interests of fair and open tendering no reference will be made to the identity of the tenderer raising the individual query or queries.

3.5 Extensions to Deadlines

No extensions will be given to the tender deadlines set out above.

3.6 Period of Validity

Tenders must remain open for consideration (unless previously withdrawn) for not less than [10] weeks from the date for return of tenders.

3.7 Failure to Proceed

Should West Midlands Growth Company and the chosen tenderer fail to enter into a contract for any reason, the chosen tenderer (and all other tenderers) shall not be reimbursed for any tendering, design, mobilisation and/or management costs (or those of any proposed subcontractors, suppliers or consultants).

The chosen tenderer will be required to return to West Midlands Growth Company (at its request) all tender documentation received (including specifications, this invitation to tender, the draft contract etc) or to destroy these.

Tenderers may not retain any documentation for their own use, or their use by third parties.

Please note as WMGC is bound by Public Procurement Law we are unable to accept any material changes to the draft contract provided with the tender documents.

3.8 Errors in Pricing

If West Midlands Growth Company discovers arithmetical errors in any tender West Midlands Growth Company will give the detail of those errors to the tenderer. The tenderer will be given the opportunity to either:

- to confirm the offer, in which case all rates or prices are to be treated as being reduced in the same proportion as the corrected total of priced items exceeds or falls short of the tendered total or such items; or
- to correct their tender, in which case the corrected figures will be used in the evaluation.

3.9 Tender Return Documents

The following documents are required in response to this invitation to tender:

- Completed Supplier Information (Appendix A)
- Completed Bidding Model (Appendix B)
- Completed Financial Information (Appendix C)
- Completed Technical and Professional Ability Information (Appendix D)
- Responses to award criteria questions (sections 3.1 c and d).

APPENDIX A – SUPPLIER TO COMPLETE

Supplier information - Please complete the following form:

a. Name of the company (Prime or single contractor) in whose name the tender would be submitted:	
b. Contact name:	
c. Address:	
d. Telephone number:	
e. Fax number:	
f. E-mail Address:	
g. Company Registration number:	
h. Date of Registration:	
i. Registered address (if different from above):	
j. VAT registration number:	
k. Website address:	

APPENDIX B – SUPPLIER TO COMPLETE

Bidding Model

Please mark 'X' in the relevant box to indicate whether you are;	
a) Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself.	<input type="checkbox"/> Yes
b) Bidding as a Prime Contractor and will use third parties to deliver <u>some</u> of the services. If yes, please provide details of your proposed bidding model in your submission, that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for.	<input type="checkbox"/> Yes
c) Bidding as Prime Contractor but will operate as a Managing Agent and will use third parties to deliver <u>all</u> of the services. If yes, please provide details of your proposed bidding model in your submission that includes members of the supply chain, the percentage of work being delivered by each subcontractor and the key contract deliverables each sub-contract will be responsible for.	<input type="checkbox"/> Yes
d) Bidding as a consortium but not proposing to create a new legal entity. If yes, please include details of your consortium in the next column and use a spate Appendix to explain the alternative arrangements i.e. why a new legal entity is not being created. Please note that the authority may require the consortium to assume a specific legal form if awarded the contract, to the extent that it is necessary for the satisfactory performance of the contract.	<input type="checkbox"/> Yes <u>Consortium members</u> <u>Lead member</u>
e) Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV).	

If yes, please include details of your consortium, current lead member and intended SPV in the next column and provide full details of the bidding model using a separate Appendix.

Yes

Consortium members

Current lead member

Name of Special Purpose Vehicle

APPENDIX C – SUPPLIER TO COMPLETE

Financial information - Please complete the following financial form to self-certify that you will provide the information requested should you be successful.

<p>a)</p> <p>i. A copy of the most recent audited accounts for your organisation that cover the last two years of trading or for the period that is available if trading for less than two years. Provided that your company qualifies for an audit exemption, then unaudited accounts can be submitted.</p> <p>ii. If the company has been trading for less than a year management accounts to date are required.</p> <p>iii. In addition to (ii) forecasted management accounts are also required.</p> <p>NB. If you have been trading for less than a year and are therefore unable to provide point i and ii, please ensure that you will be able to submit point iii. All information to be supplied in English.</p>	
<p>b) If the organisation is a subsidiary of a group, the above information is required for both the subsidiary and the ultimate parent.</p>	
<p>c) Where appropriate it may be necessary to request inter-company guarantees. Please provide consent.</p>	
<p>d) The name and address of your banker.</p>	
<p>e) Please note that following clause 7.5 of the contract the Supplier will be expected to maintain appropriate and comprehensive insurance cover for its liabilities under the contract. <i>Please confirm whether you already have, or can commit to obtain such insurance cover prior to the commencement of the contract.</i></p>	

APPENDIX D- SUPPLIER TO COMPLETE

Technical and Professional Ability

Responses to this Form will be used to undertake an assessment of your organisation’s technical and professional ability to provide the works.

		Contract 1	Contract 2
1	Customer Organisation (name):		
2	Customer contact name, phone & email:		
3	Contract start date:		
	Contract completion date:		
	Contract Value:		
4	Description of contract, including evidence as to your technical capability in this market. Please refer to Appendix D for the areas being evaluated and the marking scheme. Please use further sheets for detailing this section		

APPENDIX D (Continued)

The following marking schedule will be used to evaluate the professional and technical ability criteria:

	Description	Score	Evaluator Notes	Comments
1	Focus of Work & evaluation of outputs (maximum 5 marks)			We are looking for examples of past projects where the work undertaken has a focus on, and demonstrates a good knowledge of, a similar project with similar outputs.
2	Relevant skills and expertise (maximum 5 marks)			We are evaluating the extent to which the tenderer demonstrates that it has the specific skills and expertise needed to meet the project requirements. Please detail relevant experience of the team as they apply to this project.

A total score of 6 is required to pass.

Scoring system for selection criteria

Score	Interpretation
0	Either no answer is given or the answer provides no evidence that the Organisation meets any of the Contracting Authority's requirements.
1	The answer provides some evidence that the Organisation meets some of the Contracting Authority's requirements but only in a minimal way.
2	The answer provides satisfactory (or better) evidence that the Organisation partially meets the Contracting Authority's requirements.
3	The answer provides good (or better) evidence that the Organisation meets a majority of the Contracting Authority's requirements.
4	The answer provides good (or better) evidence that the Organisation meets nearly all of the Contracting Authority's requirements.
5	The answer provides excellent evidence that the Organisation fully meets of the Contracting Authority's requirements.

APPENDIX E. Marking Schedule

The following marking schedule will be used to evaluate the award criteria:

Score	Classification	Definition
0	No response (complete noncompliance)	No response at all or insufficient information provided in the response such that the solution is impossible to assess and/or incomprehensible.
1-2	Unsatisfactory response (potential for some compliance but very major areas of weakness)	Substantially unacceptable submission which fails in several significant areas to set out a solution that addresses and meets the requirements: little or no detail may (and, where evidence is required or necessary, no evidence) have been provided to support and demonstrate that the tenderer will be able to provide the services and/or considerable reservations as to the tenderer's proposals in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. Would represent a very high risk solution for the contracting authority
3-4	Partially acceptable response (one or more areas of major weakness)	Weak submission which does not set out a solution that fully addresses and meets the requirements: response may be basic/ minimal with little or no detail (and, where evidence is required or necessary, with insufficient evidence) provided to support the solution and demonstrate that the tenderer will be able to provide the services and/or some reservations as to the tenderer's solution in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. May represent a high risk solution for the contracting authority.

Score	Classification	Definition
5-6	Satisfactory and acceptable response (substantial compliance with no major concerns)	<p>Submission sets out a solution that largely addresses and meets the requirements, with some detail (or, where evidence is required or necessary, some relevant evidence) provided to support the solution; minor reservations or weakness in a few areas of the solution in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements.</p> <p>Medium, acceptable risk solution to the contracting authority.</p>
7-8	Fully satisfactory /very good response (fully compliant with requirements).	<p>Submission sets out a robust solution that fully addresses and meets the requirements, with full details (and, where evidence is required or necessary, full and relevant evidence) provided to support the solution; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources to deliver the requirements.</p> <p>Low/No risk solution for the contracting authority.</p>
9-10	Outstanding response (fully compliant, with some areas exceeding requirements)	<p>Submission sets out a robust solution (as for a 7-8 score – above) and, in addition, provides or proposes additional value and/or elements of the solution which exceed the requirements in substance and outcomes in a manner acceptable to the contracting authority; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources not only to deliver the requirements, but also exceed it as described.</p> <p>Low/No risk solution for the contracting authority.</p>

