

Open Tender

West Midlands Growth Company

**Tender code – 2018-WMGC-
FDIAAE**

**Foreign Direct Investment Lead Generation
– Automotive and Advanced Engineering**

August 2018

West Midlands Growth Company

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Business Birmingham
West Midlands Growth Company

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SECTION ONE – tender information

This document contains:

(1) Contract information - for reference only

- Background to West Midlands Growth Company and the programme area
- 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.

A key objective in the West Midlands Combined Authority Strategic Economic Plan (SEP) and the Greater Birmingham and Solihull SEP is to create 'the biggest concentrations of high value manufacturing businesses in Europe and their supply chains'.

The WMGC is the West Midlands' strategic marketing company, which focuses on three business areas: (i) investment, (ii) the visitor economy and (iii) strategic marketing (<https://wmgrowth.com>). This tender is issued by the West Midlands Growth Company, on behalf of its clients Drive Midlands, Birmingham City Council, GBS LEP and the City of Wolverhampton Council. (CWC)

This tender is to support the Birmingham Development Plan and Greater Birmingham & Solihull SEP. Project activity will focus on attracting key employment sites including Economic Zones in Birmingham and within the GBSLEP areas identified as having growth potential in Solihull, Cannock, Lichfield, Tamworth, Burton, Redditch, Bromsgrove and Kidderminster. The project will also focus on key employment sites including Economic Zones in Wolverhampton.



The tender is for a one year contract. It is based on generating leads in the automotive and advanced manufacturing sectors for the Greater Birmingham area which covers the regions of Greater Birmingham and Solihull and the City of Wolverhampton. The contract will be based on work packages for three territories:

- German speaking markets within Europe – LOT 1
- India – LOT 2
- North America – USA and Canada – LOT 3

Prospective suppliers may submit proposals for all, a selection of, or one geography (LOT) of the contract.

If suppliers are bidding for **more than one geography (LOT) or all**, then each lot must be submitted in a **separate bid/file**. Should the bids submitted not reflect this, the bids will be rejected.

This tender is to promote the region above under the promotional brands of Drive Midlands and Business Birmingham. The WMGC will supply the relevant proposition, which will include at a minimum

- Sector depth and local strengths
- Labour market in Greater Birmingham Solihull Local Enterprise Partnership (GBS LEP) and City of Wolverhampton Council (CWC)
- Quality of life
- Enterprise Zones/property highlights in GBS LEP and CWC
- Case studies

Drive Midlands

Greater Birmingham is in the centre of the Midlands automotive industry and is home to three Jaguar Land Rover manufacturing facilities which have seen £3bn investment over the last 5 years to update and increase capacity. In the wider Midlands region, there is a range of vehicle manufacturers including premium and volume car, commercial vehicle, sports car, motorcycle and off-highway manufacturers. Major brands include Toyota, BMW, Jaguar Land Rover, Aston Martin, Triumph, Norton, LEVC/Geely and JCB.

There is an inherent strength in research and development in the region with both Shanghai Automotive Industry Corporation (SAIC) and Changan having major technical centres in Birmingham and Solihull. R&D is supported by a world class infrastructure led by local universities and centres of excellence.



The West Midlands has 10 Universities, 8 Science Parks and 2 of the UK's top 5 business schools producing 13,400 graduates every year with the University of Wolverhampton alone delivering 1,000 graduates in technology-based subjects.

West Midlands Universities have some outstanding R&D facilities in areas such as advanced manufacturing, design, rapid prototyping and computing along with a highly successful Technology Transfer programme in place at the University of Wolverhampton.

30 of the global top 100 tier 1 suppliers are located in the Midlands, supported by over 1300 tier 2 supply chain companies

Drive Midlands provides a central hub for automotive businesses, coordinating local support services for the automotive sector and collaborating more closely with higher and further education to support skills development. By working with industry and government, Drive Midlands aims to help develop a robust local supply chain, increase local sourcing levels at Tiers 1 and 2 and improve coordinated working across the entire Midlands Engine geography.

Drive Midlands has four key objectives:

1. Supporting Inward Investment
2. Developing a robust supply chain
3. Improving partnership working
4. Developing a sustainable operation

This sector specific support programme has been developed with input from industry and led by Business Birmingham and Department for International Trade's Automotive Investment Organisation and regional Local Enterprise Partners (LEP) including: the City of Wolverhampton and the Black Country, Coventry & Warwickshire, Derbyshire & Nottinghamshire, Greater Birmingham & Solihull, Leicestershire, Stoke-on-Trent & Staffordshire, Telford Enterprise and Worcestershire.

<https://www.drivemidlands.co.uk/>

Business Birmingham

Business Birmingham is the inward investment programme within the West Midlands Growth Company and has played a key role in enabling the city to become recognised as the 6th most investible city in Europe two years running, ahead of every other UK city.

Business Birmingham 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.



Business Birmingham
West Midlands Growth Company

Advanced engineering is a key investment sector for Business Birmingham. Greater Birmingham has been at the centre of the UK's advanced engineering sector since the Industrial Revolution and today is home to 15% of the UK's advanced engineering workforce. With continued investment, innovation and market opportunities, the region is continuing to play a critical part in attracting advanced engineering investment, notably through the UK's £56bn High Speed Two (HS2) rail project, where the region is home to the project's construction and procurement HQ and at the centre of £10bn supply chain opportunities. Greater Birmingham is already home to a critical mass of expertise in the rail sector reflected in engineering, consultancy, R&D centres of excellence and manufacturing supply chain. Greater Birmingham and the wider Midlands is home to 25% of the UK's aerospace sector with key primes and tier 1 suppliers and competencies in gas turbine engines, systems that control the moving parts of aircraft, design and materials. The area is also at the forefront of low carbon manufacturing technologies and opportunities in digital manufacturing.

Business Birmingham 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.

<https://businessbirmingham.com>

Funding sources

This project is funded Birmingham City Council, Greater Birmingham and Solihull Local Enterprise Partnership, the City of Wolverhampton Council and Drive Midlands.

Drive Midlands is predominantly funded by a mix of public sector funding through the Midlands Engine via Department of International Trade and private sector sponsorship.



1.2 Project Aims and Objectives

1.2.1 Aims

This project is based on adopting a targeted approach to lead generation aimed at securing inward investment projects and new jobs created from businesses including SMEs and large companies in the Automotive and wider Advanced Engineering sectors.

The aim of this project is to appoint a supplier(s) for inward investment lead generation to the Greater Birmingham and Solihull Local Enterprise Partnership area (Greater Birmingham), which includes the cities of Birmingham and the metropolitan borough of Solihull and, additionally for this contract, the city of Wolverhampton and services associated with in-market representation.

The project will also create or build on any existing FDI pipeline in the designated territory of German speaking Europe / India / North America.

[This tender is output orientated as opposed to process orientated i.e. securing projects and jobs within the area.](#)

1.2.2 Objectives

- The appointed supplier(s) will take on the role of Drive Midlands' and Business Birmingham's strategic business development ~~partner~~ and front end sales partner in inward investment lead generation in the designated territory, which will ultimately result in new foreign owned investment and jobs in the Greater Birmingham [area which also includes Wolverhampton.](#)
- In addition, the role will involve providing strategic in-market support to the Business Birmingham team.
- The appointed supplier(s) will also work closely with Business Birmingham's strategic partners (e.g. Department for International Trade post teams) where appropriate and is strongly encouraged to use their market knowledge in order to identify new geographic and market opportunities for Greater Birmingham.
- The appointed supplier(s) would also be expected to engage with (where appropriate and in agreement with partners such as the Department for International Trade) targeting of parent companies of existing UK subsidiaries in Greater Birmingham for expansion projects.
- After identification of a potential investor, the lead generation agency will represent Drive Midlands / Business Birmingham to the client providing an account management service until the project is transferred to Drive Midlands / Business Birmingham for completion.



- The lead generation agency will attend selected trade events and support the Drive Midlands / Business Birmingham 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.

1.2.2 Duration

The contract will run for one year **ONLY** from 3rd September 2018 to 30th August 2019.

1.2.3 Value

The value of this contract is up to a maximum of £129,500 plus VAT.

Approximately 40% of the contract value is based on achievement of project outputs as detailed in 2.1.3.

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

- *Completed Project £1,400
- *Jobs Created £300 per job

*For definitions, refer to 2.1.2.

This equates to a value for each work package as follows:

LOT	Territory	Base Contract	Target Achievement	Total
1	German speaking Europe	£32,400	£20,100	£53,500
2	India	£30,200	£19,800	£50,000
3	North America	£12,700	£13,300	£26,000
	Total	£76,300	£53,200	£129,500

1.3 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

2.1.1

The purpose of the project is to reach and qualify companies looking to capitalise on market opportunities presented by **locating or expanding** in the Greater Birmingham area. For the purpose of this tender Greater Birmingham covers the areas of the Greater Birmingham and Solihull LEP and the City of Wolverhampton.

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For automotive companies, target businesses could include:

- Companies with existing UK or European vehicle manufacturer or large supply contracts looking to establish a local supply base to be closer to the customer
- Companies looking to capitalise on the annual £4bn opportunity for Tier 1 component supply to UK vehicle manufacturers
- Companies looking to accelerate technology acquisition through capitalising on the world class automotive R&D ecosystem in the region
- Companies looking to grow overseas through Mergers and Acquisitions (M&A)
- Companies looking to grow in existing or new and emerging technologies such as vehicle electrification, and connected and autonomous vehicles
- Companies headquartered in the designated territory with a UK location looking to expand

Additionally, for the wider advanced engineering sector, target businesses could include:

- Companies in the rail sector, notably in relation to the HS2 project (notably relating to German speaking markets)
- Companies in robotics, automation, digital manufacturing and Industry 4.0 technologies (notably relating to German speaking markets)
- Companies in new, emerging and innovative manufacturing technologies to the UK market
- Companies in energy systems/ low carbon technologies



- Existing advanced engineering businesses with a presence already in Greater Birmingham with potential to expand, notably from target sub-sectors: aerospace, low carbon and rail
- Companies in general engineering or manufacturing activities

To support the effort, Drive Midlands / Business Birmingham will provide place-based and relevant sector proposition reference material relating to the attractiveness of the UK and particularly Greater Birmingham, as a location for doing business and the surrounding market potential and will support with the development of client specific propositions and client inward visits

Activity should be based on engagement with businesses with sufficient growth potential to yield 20 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 Drive Midlands or Business Birmingham
- 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 Drive Midlands or Business Birmingham
- 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, and that 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.

2.1.3 Project Outputs

- Contact made with decision makers at all agreed target companies
- Attend selected business development activities including trade events and support Drive Midlands / Business Birmingham with meeting programmes. We expect the supplier to attend a **maximum of 2 per LOT during contract period.**
- Attend and support organisation of any Drive Midlands / Business Birmingham sales missions. We expect the supplier to attend a **maximum of 2 per LOT during contract period.**
- Progression in the sales process to:
 - Generate awareness of the benefits of establishing a presence in Greater Birmingham
 - Lead the target business to seriously consider Greater Birmingham as a location
 - Identifying and removing any barriers or objections to Greater Birmingham as a location
 - Work with the Drive Midlands or Business Birmingham team to secure new investment or expansion projects

The quantitative target outputs for the designated territories are as follows:

LOT 1: German speaking territories – 1 project must be in Wolverhampton

Deliverable	Automotive	Advanced Engineering	Total	Jobs Created
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Completed Projects	1	2	3	53
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LOT 2: India – 1 project must be in Wolverhampton

Deliverable	Automotive	Advanced Engineering	Total	Jobs Created
Completed Projects	2	1	3	52

LOT 3: North America

Deliverable	Automotive	Advanced Engineering	Total	Jobs Created
Completed Projects	1	1	2	35

Note: A minimum of one project each should land in Wolverhampton for both Germany and India.

2.2 Project management

Meetings/calls shall be held on a monthly basis between the supplier and key personnel from Drive Midlands / Business Birmingham. 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 Drive Midlands / Business Birmingham 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 end of August 2019.

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 promotional banners, and all intellectual property rights to the deliverables produced and assigned to Drive Midlands / Business Birmingham. The outputs of this project must be kept strictly confidential and they cannot be shared with any third party without written permission from Drive Midlands / Business Birmingham.

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 Drive Midlands / Business Birmingham.

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.

SECTION THREE – tender process and evaluation

3.1 Response requirements

All tenders must submit a separate bid (files) for each LOT that they are bidding for and these should be clearly labelled.

Minimum requirements



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A proposal is required that includes the following:

- Appendix A – Supplier Information – for information –
- Appendix B – Bidding Model – for information –
- Appendix C – Financial Information – pass/fail

If you are tendering for more than one LOT and the supplier details and bidding model is the same then only once copy of appendices A, B and C need to be completed and submitted.

If, however the supplier details are different and/or bidding model is different, then the appendices A, B & C should be submitted for each LOT being tendered for.

- Appendix D – Technical & Professional Ability – pass/fail

Appendix D must be submitted for every LOT tendered for.

All of the above appendices **MUST** be completed for all consortia partners that are part of the bid proposal

- Appendix C – Financial Information - tenderers are required to self-certify that they will
 - provide the financial information as detailed in Appendix C if they are the successful supplier
 - provide copies of minimum levels of Insurances
 - Employer's (Compulsory) Liability Insurances = £2 million
 - Public Liability Insurance = £2 million
- Appendix D – Technical & Professional Ability - Relevant case studies (**min 2, max 3**) to demonstrate your expertise in delivering similar projects to the specification for each of the (LOT) geographies for which you are submitting a proposal – please complete **Appendix D** which further details information on the evaluation of the case studies. Please ensure this is uploaded as a separate labelled file.

Information on the account team relevant to the case studies including:

- qualifications, experience, expertise and skills of individuals assigned to the contract
- references from previous clients who have worked with the account team.

If submitting as a business consortium, please provide a minimum 1 case study demonstrating previous work as a consortium (can be with a different partner to the one you are partnering with in this bid submission), additionally provide a minimum 1 case study from each partner in



this business consortium demonstrating experience relating to the development and delivery of inward investment lead generation services.

If submitting a bid including sub-contracted delivery please provide a minimum 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 a minimum 1 case study demonstrating experience relating to the development and delivery of inward investment lead generation services from each partner in this business consortium.

Note – if this contract is delivered as a consortium then the contracting partner has full responsibility for the performance of the contract and the management of any partners or sub-contractors.

Award Criteria response requirements

- Details of your proposed approach and methodology (detailed separately for each LOT being tendered for) to cover all aspects detailed in section 2.1.1
 - Include how the expertise & knowledge you hold in the geographic area(s) tendered for will aid in achieving the objectives.
 - Include targeting methodology and pipeline development approach
 - Project management
 - Provision for in-country presence
 - Proposed multiplier engagement
 - Proposed sales, activity and marketing plan for the contract including a list of proposed trade shows/events
 - Completion of 2.5 Conflicts of Interest methodology
- **Total Cost** for each of the outputs listed above with a clear breakdown of costs related to delivering the contract in order to achieve the required outcomes.
- In the event of a bid submission for multiple lots, costings should be detailed separately for each lot for which a bid is submitted.
- The breakdown should include all management, service, research, travel, accommodation, subsistence, event attendance and any other anticipated costs.
- 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 Minimum requirements

- a) Completion of Appendix A, B, C & D



b) Financial Information

- a. Financial Information - pass/fail
- b. Minimum levels of insurances - pass/fail

Supplier is required to indicate yes or no (in Appendix C)

Please self-certify whether you already have, or can commit to obtain, prior to the commence of the contract, the levels of insurance cover indicated in section 3.1 and Appendix C.

Financial Information – marked pass or fail based on company financial statements and information provided – please complete Appendix A, B & C. Financial stability will only be required by the successful supplier and will be evaluated as follows: -

- a. **Annual turnover**
- b. **Current ratio – Solvency** (Pass if ratio is greater than or equal to 1; Fail if less than 1) (Pass if ≥ 1 ; Fail if < 1)
- c. **Gearing ratio – Equity-Debt ratio** (Pass if ratio is less than or equal to 1; Fail if greater than 1) (Pass if ≤ 1 ; Fail if > 1)
- d. **Interest cover** – Ability to fulfil short-term obligations to borrowers (Pass if ratio is greater than or equal to 3 times; Fail if less than 3 times) (Pass if ≥ 3 times; Fail if < 3 times)
- e. **Adequacy of the reserves** – Looking at Profitability and the depletion of reserves

The evaluation panel 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 an overall fail.

d) Appendix D – Technical & Professional Ability – pass/fail

A total score of 10 from a maximum of 15 is required to pass. Refer to Appendix D for marking scheme. Allocated as below:

- o Nature of Work – 5 marks available
- o Evaluation of Outputs – 5 marks available
- o Relevant Experience – 5 marks available



3.2.2 Award Criteria – see Appendix E for marking schedule for Methodology and Approach

- a) Methodology and approach - weighted **80%** and assessed against the following:
- Tell us how you plan to deliver the lead generation activity taking into account key specifications of the project as listed under section 2.1.1 **(20%)**
 - Tell us how you plan to deliver the support activities taking into account key specifications of the project as listed under section 2.1.1 **(15%)**
 - Please provide a detailed methodology of how you will achieve the required measurable outputs as listed under section 1.2.1 **(20%)**
 - How relevant, robust and realistic is the proposed approach to assess key specifications as listed under section 2.1.1 and specific outputs of the project as listed under section 1.2.1 **(10%)**
 - Please provide information about what resources you will put to the project and how you will manage these to meet the project requirements **(10%)**
 - The ability of the Tenderer to manage any conflicts of interest that may arise when fulfilling the project requirements **(5%)**

- b) Price - weighted **20%** and evaluated as follows:

The total price 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, direct staff costs, service, research, travel, accommodation, subsistence, event attendance and other expenses.

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



- **10%** - Total fixed cost price for the duration 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 = $Z1/P1 \times 10$

- **10%** - A clear detailed breakdown provided of the costs for the duration as listed in section 2.1.1.

If a Tender appears to be abnormally low Marketing Birmingham will follow the process in Regulation 69 of the Regulations. A failure to provide a satisfactory explanation for a low price may lead to disqualification of the Tenderer.

NB – Drive Midlands and WMGC 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. WMGC reserves the right to change it at its discretion.

Milestone	Deadline and process
Brief stage	
Brief & task	WMGC to issue open tender by appropriate invitation on Monday 30th July 2018
Response deadline	Companies must respond and submit their proposal to be with Marketing Birmingham no later than 12:00 noon BST on Monday 20th August 2018.
Submitting your tender	<p>The WMGC 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>



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.

If you are experiencing any technical difficulties or require any help, you should contact WMGC at the earliest possible point prior to the deadline in order to resolve any issues. Failure to communicate with us prior to the deadline will result in your company being removed from the procurement process.

Telephone 0121 202 5115 – please quote the tender reference number.

Stage 2 – Identify and submit questions

Please submit any question to WMGC via the In-tend portal as a correspondence message by no later than **12 noon Tuesday 14th August 2018**.

We will endeavour to respond to all questions by **close of play Wednesday 15th August 2018**.

Stage 3 – Submit tender

The final tender **MUST** be submitted as electronic copy via the In-Tend system.

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.

Failure to submit due to the uploading speed is not a viable reason to request an extension to the deadline. Any technical errors encountered should be communicated to the Procurement Manager at WMGC with screen shots of the error messages or error screens as evidence.

Please note: Failure to submit the requirements above by the stated deadlines will result in your company being removed from the procurement process.



Evaluation stage	
Expected date of evaluation	All responses will be evaluated against pre-identified criteria by the project management team by Tuesday 28th August 2018.
Contract Award: Expected date of notification of successful and unsuccessful tenders	Notification of successful and unsuccessful tenders will be made on Wednesday 29th August 2018.
Expected date of appointment and project initiation	The expected date of appointment is Thursday 30th August 2018. A project initiation meeting will be held via conference call soon after appointment.

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.

WMGC 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 WMGC 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 WMGC (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.

3.8 Costs

Each tenderer shall bear its own costs and liabilities in relation to all stages of the procurement process including the preparation, submission and clarification of tenders. Under no circumstances shall Marketing Birmingham be required to reimburse any tenderer for its tendering costs or for any costs incurred in participating in this procurement.

3.9 Errors in Pricing

If WMGC discovers arithmetical errors in any tender, WMGC 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.
- If a Tender appears to be abnormally low, WMGC will follow the process in Regulation 69 of the Public Contracts Regulations 2015. A failure to provide a satisfactory explanation for a low price may lead to disqualification of the Tenderer.

3.10 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 section 3.1, 3.2.1 and 3.2.2



APPENDIX A – SUPPLIER TO COMPLETE



Business Birmingham
West Midlands Growth Company

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 – BIDDING MODEL - **SUPPLIER TO COMPLETE**



Business Birmingham
West Midlands Growth Company

Please mark 'X' in the relevant box to indicate whether you are;	
<p>a) Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself.</p>	<input type="checkbox"/> Yes
<p>b) Bidding as a Prime Contractor and will use third parties to deliver <u>some</u> of the services.</p> <p>If yes, please provide details of your proposed bidding model in your submission, that <u>submission that</u> 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.</p>	<input type="checkbox"/> Yes
<p>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.</p> <p>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.</p>	<input type="checkbox"/> Yes
<p>d) Bidding as a consortium but not proposing to create a new legal entity.</p> <p>If yes, please include details of your consortium I the next column and use a spate Appendix to explain the alternative arrangements i.e. why a new legal entity is not being created.</p> <p>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.</p>	<input type="checkbox"/> Yes <u>Consortium members</u> <u>Lead member</u>
<p>e) Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV).</p> <p>If yes, please include details of your consortium, current lead member an intended SPV in the next</p>	<input type="checkbox"/>



column and provide full details of the bidding model using a separate Appendix.	<p>Yes</p> <p><u>Consortium members</u></p> <p><u>Current lead member</u></p> <p><u>Name of Special Purpose Vehicle</u></p>
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APPENDIX C – FINANCIAL INFORMATION - SUPPLIER TO COMPLETE



Business Birmingham
West Midlands Growth Company

Please complete the following financial form and confirm which section is relevant or not applicable and that this information will be provided if you are the successful supplier before contract signage for evaluation:

<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 submit point iii, as no information will result in an automatic fail</p> <p>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>	
<p>g) Minimum levels of Insurance Cover</p> <p>Employer's (Compulsory) Liability Insurance = £2 million</p>	<p>YES <input type="checkbox"/> NO <input type="checkbox"/></p>



h) Public Liability Insurance = £2 million

YES ☐

NO ☐



APPENDIX D – TECHNICAL AND PROFESSIONAL ABILITY - SUPPLIER TO COMPLETE

Responses to this Form will be used to undertake an assessment of your organisation's technical and professional ability to provide the works. This should be completed for every LOT tendered for.

EXPERIENCE AND CONTRACT EXAMPLES				
<p>Please provide details of up to a minimum of 2 and maximum of 3 contracts that are relevant to the tender geography LOT requirement. Contracts should have been performed during the past three years. (The customer contact should be prepared to speak to WMGC to confirm the accuracy of the information provided below if we wish to contact them).</p>				
		Contract 1	Contract 2	Contract 3
1	Customer Organisation (name):			
2	Customer contact name, phone & email:			
3	Contract start date:			
	Contract completion date:			
	Contract Value:			
4	<p>Relating to the specification and in particular case studies demonstrating your expertise in delivering similar projects for each of the geographies for which you are submitting a proposal (maximum of 500 words per case study explain the nature of work and outputs achieved). Please use separate sheets if required.</p>			
<p>If you cannot provide at least one example, please briefly explain why (100 words max) –</p>				

APPENDIX D (Continued)

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

	Description	Evaluator Notes	Comments
1	Nature of Work (5 marks available)		Different from 'complexity' the nature of work should highlight projects where the work undertaken is the same as the project applied for.
2	Evaluation of Outputs (5 marks available)		Looks to identify outputs of similar projects to that applied for. The case studies should clearly outline the project objectives, KPIs and outputs achieved versus set by the client E.g. examples of Lead Generation achieved
3	Relevant Experience (5 marks available)		Assessment team are evaluating past experience and skills of key personnel delivering on the contracts similar to this contract e.g. Account Manager Scoring of case study(s)

A total score of 10 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)	<p>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.</p> <p>Would represent a very high-risk solution for the contracting authority</p>
3-4	Partially acceptable response (one or more areas of major weakness)	<p>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.</p> <p>May represent a high-risk solution for the contracting authority.</p>

Score	Classification	Definition
5-6	Satisfactory and acceptable response (substantial compliance with no major concerns)	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. Medium, acceptable risk solution to the contracting authority.
7-8	Fully satisfactory /very good response (fully compliant with requirements).	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. Low/No risk solution for the contracting authority.
9-10	Outstanding response (fully compliant, with some areas exceeding requirements)	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. Low/No risk solution for the contracting authority.

