

**United Kingdom-Liverpool: Custom broker services**  
**OJ S 57/2015 21/03/2015**  
**Contract notice**  
**Services**

**Directive 2004/18/EC**

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Liverpool City Region Local Enterprise Partnership

Postal address: 12 Princes Parade

Town: Liverpool

Postal code: L3 1BG

Country: United Kingdom

For the attention of: Andy Devaney

E-mail: [andy.devaney@liverpoollep.org](mailto:andy.devaney@liverpoollep.org)

Telephone: +44 1512373522

**Internet address(es):**

General address of the contracting authority: <http://www.liverpoollep.org>

Electronic submission of tenders and requests to participate: <http://www.liverpoollep.org/opportunities/tenders.aspx>

**Additional information can be obtained from:**

the abovementioned address

**Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from:**

the abovementioned address

**Tenders or requests to participate must be submitted:** the abovementioned address

**I.2. Type of the contracting authority**

Other: Local Enterprise Partnership

**I.3. Main activity**

Economic and financial affairs

**I.4. Contract award on behalf of other contracting authorities**

The contracting authority is purchasing on behalf of other contracting authorities: no

**Section II: Object of the contract**

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**II.1. Description**

**II.1.1. Title attributed to the contract by the contracting authority**

Liverpool City Region Growth Hub Brokerage Partners.

**II.1.2. Type of contract and place of performance or delivery**

Services

Service category No 11: Management consulting services [6] and related services

Main site or place of performance: A suitable location in the appropriate Local Authority area.

NUTS code

**II.1.3. Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

#### **II.1.4. Information about framework agreement**

Framework agreement with several operators

Maximum number Envisaged maximum number of participants to the framework agreement  
: 15

#### **Duration of the framework agreement**

Duration in years: 3

#### **Estimated total value of purchases for the entire duration of the framework agreement**

Estimated value excluding VAT:

Range: between 1 and 2 000 000 GBP

Frequency and value of the contracts to be awarded: Unknown.

#### **II.1.5. Short description of the contract or purchase(s)**

The Liverpool City Region is made up of 6 Local Authority areas (Halton, Knowsley, Liverpool, Sefton, St Helens, Wirral).

Liverpool City Region Local Enterprise Partnership (the LEP) has been awarded funds by Dept for Business Innovation and Skills (BIS) to establish a Growth Hub for the City Region. The purpose of the Liverpool City Region Growth Hub is to support pre-start, new and existing businesses in the City Region to grow through diagnosing their needs and signposting them into the most appropriate assistance available from the extensive range of commercial and publicly funded services available. In doing so it aims to simplify, coordinate and commercialise the business support landscape and increase the take up of business support services that add value to businesses and directly support their establishment, survival and growth.

It seeks to do this through engaging 'Brokerage Partners' in each Local Authority area who will be promoted as the 'go to' broker for business support. Each brokerage partner will be required to work to Growth Hub protocols provided by the LEP to diagnose the needs of businesses and individuals who contact them and then work with them to objectively identify and signpost the most appropriate sources of advice and support for them, including UK Government Business Growth Services where relevant to business needs. The responsibility for selecting the service, through evaluation and procurement as appropriate will remain with the business.

A more detailed guide to the role and purpose of the Liverpool City Region Growth Hub is provided for guidance on the LEP website at [www.liverpoollep.org](http://www.liverpoollep.org)

Bidding organisations will need to demonstrate their commercial experience and expertise in determining business needs and signposting them successfully to appropriate services.

The LEP is seeking to secure a Framework of brokerage partners, from which to subsequently contract according to available budgets on a periodic basis. Initial contracting will be based on BIS Growth Hub funding with subsequent contracting utilising ERDF and other funds as they may become available.

#### **II.1.6. CPV code(s)**

79223000 Custom broker services - DA03

#### **II.1.7. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: yes

#### **II.1.8. Lots**

This contract is divided into lots: yes

Tenders may be submitted for one or more lots

### **II.1.9. Information about variants**

Variants will be accepted: no

## **II.2. Scope of the procurement**

### **II.2.1. Total quantity or scope**

This framework agreement is proposed to be established for a minimum of 3 years, with the option to renew for a further 3 years subject to performance review and approval of the LEP. Over this extended period the potential value, subject to securing ERDF and other funding, is estimated at 2 000 000 GBP.

During this period, the LEP reserves the option to open further calls to the framework according to its requirements. Funding is currently available for 1 year of activity.

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region.

Providers may bid to be included on the framework in 1 or more lots. Providers appointed to the framework will have the opportunity to bid for funds periodically as contracts are placed and awarded.

Services contracted for delivering effective Brokerage services are expected to include, but are not limited to, the following:

- Mapping of Business Support Services;
- Provision of Business Information;
- Business Pre-Start, Start-up and Growth Diagnostic;
- Business Pre-Start, Start-up and Growth Signposting;
- Provision/Facilitation of Business Networks;
- Promotion of Growth Hub Services;
- Collaboration with local delivery and brokerage partners;
- Maintaining records on common CRM platform;
- Evaluation of business support impact.

Estimated value excluding VAT:

Range: between 1 and 2 000 000 GBP

### **II.2.2. Information about options**

Options: no

### **II.2.3. Information about renewals**

This contract is subject to renewal: yes

Number of possible renewals: Range: between 1 and 2

In the case of renewable supplies or service contracts, estimated timeframe for subsequent contracts:

in months: 35 (from the award of the contract)

## **II.3. Duration of the contract or time limit for completion**

Start 1.5.2015. Completion 31.3.2018

Information about lots

Lot No: 1

Lot title: Halton

#### **1) Short description**

Brokerage services for all aspects of Business Support in the Halton Local Authority area.

#### **2) CPV code(s)**

79223000 Custom broker services - DA03

#### **3)**

## Quantity or scope

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region. Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;
- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;
- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

Each Brokerage Partner must utilise the [www.advicefinder.co.uk](http://www.advicefinder.co.uk) system or any other system as specified by the LEP for the online search and identification of appropriate services for business. This will be maintained by the LEP with current information on services for businesses in a readily searchable format.

Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

## 4) Indication about different time frame or duration

Start 1.5.2015. Completion 31.3.2018

## 5) Additional information about lots

Lot No: 2

Lot title: Knowsley

### 1) Short description

Brokerage services for all aspects of Business Support in the Knowsley Local Authority area.

### 2) CPV code(s)

79223000 Custom broker services - DA03

### 3) Quantity or scope

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region. Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;
- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;
- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

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Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside

those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

#### **4) Indication about different time frame or duration**

Start 1.5.2015. Completion 31.3.2018

#### **5) Additional information about lots**

Lot No: 3

Lot title: Liverpool

##### **1) Short description**

Brokerage services for all aspects of Business Support in the Liverpool Local Authority area.

##### **2) CPV code(s)**

79223000 Custom broker services - DA03

##### **3) Quantity or scope**

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region. Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;
- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;
- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

Each Brokerage Partner must utilise the [www.advicefinder.co.uk](http://www.advicefinder.co.uk) system or any other system as specified by the LEP for the online search and identification of appropriate services for business. This will be maintained by the LEP with current information on services for businesses in a readily searchable format.

Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

#### **4) Indication about different time frame or duration**

Start 1.5.2015. Completion 31.3.2018

#### **5) Additional information about lots**

Lot No: 4

Lot title: Sefton

##### **1) Short description**

Brokerage services for all aspects of Business Support in the Sefton Local Authority area.

##### **2) CPV code(s)**

79223000 Custom broker services - DA03

##### **3) Quantity or scope**

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region. Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;
- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;

- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

Each Brokerage Partner must utilise the [www.advicefinder.co.uk](http://www.advicefinder.co.uk) system or any other system as specified by the LEP for the online search and identification of appropriate services for business. This will be maintained by the LEP with current information on services for businesses in a readily searchable format.

Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

#### **4) Indication about different time frame or duration**

Start 1.5.2015. Completion 31.3.2018

#### **5) Additional information about lots**

Lot No: 5

Lot title: St Helens

##### **1) Short description**

Brokerage services for all aspects of Business Support in the St Helens Local Authority area.

##### **2) CPV code(s)**

79223000 Custom broker services - DA03

##### **3) Quantity or scope**

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region. Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;

- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;
- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

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Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

#### **4) Indication about different time frame or duration**

Start 1.5.2015. Completion 31.3.2018

#### **5) Additional information about lots**

Lot No: 6

Lot title: Wirral

##### **1) Short description**

Brokerage services for all aspects of Business Support in the Wirral Local Authority area.

##### **2) CPV code(s)**

79223000 Custom broker services - DA03

##### **3) Quantity or scope**

The framework is for 6 separate lots, 1 for each Local Authority area of the City Region.

Providers may bid to be included on the framework in 1 or more lots. Each lot has the same requirement and scope as set out below:

If there is more than 1 Brokerage Partner appointed to the framework in a single lot then a

competitive tender process will be undertaken to appoint the most appropriate supplier or suppliers according to the specific activity. This process will take place whenever activity is required to take place.

The Brokerage partner will be a primary access point for brokerage to a wide range of business support services in the Local Authority area covered by the Growth Hub. This is expected to include, but is not limited to, the following:

- Pre-start support;
- Business Start;
- Business Growth;
- Business Planning;
- Business Finance;
- Business Mentoring;
- Skills and Training;
- Sales and Marketing;
- Supply Chains/Procurement;
- Innovation, Research and Development;
- Product, Service and Process Development;
- Export and Import;
- Business Premises;
- Business Networks;
- Mentoring;
- Sector Specialists;
- Accessing and taking advantage of the International Festival for Business in 2016.

Each Brokerage Partner will be required to signpost business into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, who they select to provide services, using appropriate procurement and evaluation.

Each Brokerage Partner will be required to record all activity onto a common CRM system, operated by the LEP, to ensure support for business through the Growth Hub is coherent and that brokerage destinations and effectiveness can be monitored.

Each Brokerage Partner must utilise the [www.advicefinder.co.uk](http://www.advicefinder.co.uk) system or any other system as specified by the LEP for the online search and identification of appropriate services for business. This will be maintained by the LEP with current information on services for businesses in a readily searchable format.

Brokerage Partners who also directly deliver services to business must ensure and demonstrate to the LEP's satisfaction that these services are considered equally alongside those of other providers when delivering the brokerage service. Activity and performance will be subject to monitoring and scrutiny by the LEP.

It should be noted that appointment to the framework is not a guarantee of any work being commissioned or contracts being awarded.

Estimated value excluding VAT:

Range: between 1 and 333 333 GBP

#### **4) Indication about different time frame or duration**

Start 1.5.2015. Completion 31.3.2018

#### **5) Additional information about lots**

### **Section III: Legal, economic, financial and technical information**

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### **III.1. Conditions related to the contract**

#### **III.1.1. Deposits and guarantees required**

Deposits and guarantees are not required.

#### **III.1.2. Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them**

Participants will be required to bid into local provision and will be paid on defrayal subject to LEP payment terms.

#### **III.1.3. Legal form to be taken by the group of economic operators to whom the contract is to be awarded**

N/a.

#### **III.1.4. Contract performance conditions**

The performance of the contract is subject to particular conditions: yes

Description of particular conditions: Each participant will be set specific targets and each contract will be evaluated on an annual basis when the LEP will reserve the right to terminate the contract with 1 or all of the participants in the event of non compliance.

### **III.2. Conditions for participation**

#### **III.2.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions: Evidence of established business network in area of application.

#### **III.2.2. Economic and financial ability**

List and brief description of conditions: Latest audited accounts and Finance Director or auditor statement.

Minimum level(s) of standards possibly required: Organisations need to demonstrate sufficiently financially robust systems to bear the costs of a defrayal based payment system for the area/areas applied for.

#### **III.2.3. Technical and professional ability**

List and brief description of conditions:

References.

Minimum level(s) of standards possibly required:

3 years expertise and experience of brokering effective business support services.

#### **III.2.4. Information about reserved contracts**

### **III.3. Conditions specific to services contracts**

#### **III.3.1. Information about a particular profession**

Execution of the service is reserved to a particular profession: no

#### **III.3.2. Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract: yes

## **Section IV: Procedure**

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### **IV.1. Type of procedure**

#### **IV.1.1. Type of procedure**

Open

#### **IV.1.2. Information about the limits on the number of candidates to be invited**

#### **IV.1.3. Information about reduction of the number of solutions or tenders during negotiation or dialogue**

### **IV.2. Award criteria**

#### **IV.2.1. Award criteria**

The most economically advantageous tender in terms of Criteria below

1. Business Support Experience — Demonstrate the commercial experience that the organisation, and the team it will team engage in this role, have in supporting businesses and helping them to make informed choices as to the most appropriate commercial and funded support to meet their needs. Weighting 20

2. Commercial Business Knowledge and Experience — Demonstrate commercial business expertise, understanding of business and the local business community and experience in responding to its needs by the organisation and the team it will engage. Weighting 20

3. Local Presence — As the Growth Hub Brokerage Partner you will be expected to be a trusted 'go to' broker in each specific lot for a wide range of business from pre start to high growth. Demonstrate how you currently fulfil this role and how you will provide a local presence. Weighting 20

4. EU and Government Contract / Partnership Experience — Growth Hub Brokerage Partners will be required to comply with Government and EU criteria in supporting business. Demonstrate how you have previously done this and how you will address it for this role. Weighting 20

5. Cost — Provide a unit cost for providing a full time equivalent Growth Hub Broker to deliver the Brokerage Service. Weighting 20

#### **IV.2.2. Information about electronic auction**

An electronic auction will be used: no

### **IV.3. Administrative information**

#### **IV.3.1. File reference number attributed by the contracting authority**

#### **IV.3.2. Previous publication concerning this procedure**

no

#### **IV.3.3. Conditions for obtaining specifications and additional documents or descriptive document**

Payable documents: no

#### **IV.3.4. Time limit for receipt of tenders or requests to participate**

16.4.2015 - 17:00

#### **IV.3.5. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

#### **IV.3.6. Languages in which tenders or requests to participate may be submitted**

English.

#### **IV.3.7. Minimum time frame during which the tenderer must maintain the tender**

#### **IV.3.8. Conditions for opening of tenders**

Date: 17.4.2015

Place:

12 Princes Parade.

Persons authorised to be present at the opening of tenders: no

### **Section VI: Complementary information**

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#### **VI.1. Information about recurrence**

This is a recurrent procurement: no

#### **VI.2. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
yes

Identification of the project: It is anticipated that the Growth Hub will bid in to the 2014-20 EU Structural Funds Programme.

#### **VI.3. Additional information**

#### **VI.4. Procedures for review**

##### **VI.4.1. Review body**

Official name: Liverpool City Region Local Enterprise Partnership

Postal address: 12 Princes Parade

Town: Liverpool

Postal code: L3 1BG

Country: United Kingdom

Telephone: +44 1512372727

Internet address: <http://www.liverpoollep.org>

##### **VI.4.2. Review procedure**

##### **VI.4.3. Service from which information about the review procedure may be obtained**

Official name: Liverpool City Region Local Enterprise Partnership

Postal address: 12 Princes Parade

Town: Liverpool

Postal code: L3 1BG

Country: United Kingdom

Telephone: +44 1512372727

Internet address: <http://www.liverpoollep.org>

#### **VI.5. Date of dispatch of this notice**

17.3.2015