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Award

Investment Platform Consultancy Support

BORDER TO COAST PENSIONS PARTNERSHIP LIMITED

UK5: Transparency notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-015019

Procurement identifier (OCID): ocds-h6vhtk-0502a6 ([view related notices](#))

Published 14 April 2025, 3:02pm

Scope

Description

Border to Coast has propositions within Public Listed, Private Markets, and Real Estate asset classes that deliver investment opportunities and management to our Partner Funds, with specific systems in place for each asset class.

As part of our strategy to offer more capabilities to our Partner Funds and a unified approach to data within the organisation, we need to implement a platform that enables management of, and insight into, Partner Fund cross-asset investments.

We wish to procure an investments and data platform to support the efficient and effective implementation of these new capabilities. The platform needs to have interoperability with our administrator and other third parties to enable reporting on the whole customer fund and the provision of these new capabilities. In support of this procurement, we require consultancy support to assist us with our selection of an appropriate system, as set out below.

Border to Coast's Requirement for Consultancy Support

The service provider should be able to demonstrate a strong background working with Asset

Managers and Owners, including a firm understanding how these organisations operate with third party administrators/asset servicers. Additionally, experience is required in selecting and implementing this type of platform, including knowledge of public procurement processes.

The support Border to Coast requires is as follows:

Guidance to help prepare our Invitation to Tender for the investments and data platform procurement, including:

i. feedback and input into the development of functional requirements,

with the objective of helping us avoid omissions and/or ambiguity in our requirements. These requirements will be used to assess

platforms.

ii. Advice, based on experience of previous implementations, on

identifying common pitfalls to avoid, guidance on how to manage

these at this stage of investments and data platform procurement.

iii. providing guidance on the achievability of our expectations implied by the tender, and the extent to which they are in line with the industry / marketplace.

iv. helping us ensure vendor awareness in the market, of our Invitation to

Tender, subject to complying with public procurement regulations.

v. assisting with defining the scoring approach (e.g., pod breakdown,

weighting focus) to proposals received from vendors.

Support when reviewing tenders:

i. the consultant to help us prepare a shortlist of credible vendor

options from those tendering, for further review and to invite to

demonstrate their system and present their tender.

ii. an indication of realistic timescale expectations for implementing and configuring an investments and data platform.

iii. in respect of shortlisted vendors, support to help us prepare for and review potential demonstrations/presentations from vendors and attend those demonstrations/presentations with us.

iv. assisting with scoring of proposals from vendors, in line with our public procurement scoring framework and the requirements of the tender. This includes using the scoring template to score each vendor proposal, that Border to Coast would provide, and participating in

scoring moderation meetings with us (which may involve onsite

meetings at our Leeds office) - indicating expected availability for

such meetings.

v. providing focused technical support on any complexities and

operating model impacts identified in the review process, in relation to any final scoring decisions.

Contract 1. Investment and Data Platform Consultancy Support

Supplier

- [Liqueo Limited](#)

Contract value

- £237,840 including VAT

Above the relevant threshold

Earliest date the contract will be signed

10 May 2025

Contract dates (estimated)

- 12 May 2025 to 4 August 2025
- 2 months, 24 days

Main procurement category

Services

CPV classifications

- 72220000 - Systems and technical consultancy services
- 72250000 - System and support services

Contract locations

- UKC - North East (England)
- UKD - North West (England)

- UKE - Yorkshire and the Humber
- UKF - East Midlands (England)
- UKG - West Midlands (England)
- UKH - East of England
- UKI - London
- UKJ - South East (England)
- UKK - South West (England)

Other information

Conflicts assessment prepared/revised

Yes

Procedure

Procedure type

Direct award

Direct award justification

- Single supplier - technical reasons
- Extreme and unavoidable urgency

3 tenders were assessed on a Most Advantageous Tender basis, the scoring of which has been formally documented.

The expected spend for this service is over threshold and so an open procurement would have been the usual course of action, but the decision was made not to on the basis that this is a short term piece of work which we require to commence urgently in order to ensure that we adhere to the timeline of the business and deliver required outcomes to our Partner Funds. If an open process was followed at this stage, it would be highly unlikely that a system would be implemented prior to the required deadlines, which would pose operational risk and resilience impacts to the organisation and our Partner Funds.

A contract award notice will be published to notify that we will enter into a Standstill Period that will end on midnight 25th April.

Supplier

Liqueo Limited

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London

WC1N 3AX

United Kingdom

Email: info@liqueo.com

Website: <https://www.liqueo.com/>

Region: UKI31 - Camden and City of London

Small or medium-sized enterprise (SME): Yes

Voluntary, community or social enterprise (VCSE): No

Contract 1. Investment and Data Platform Consultancy Support

Contracting authority

BORDER TO COAST PENSIONS PARTNERSHIP LIMITED

- Companies House: 10795539
- Public Procurement Organisation Number: PZTH-6472-NGDG

5th Floor Toronto Square

Leeds

LS1 2HJ

United Kingdom

Email: procurement@bordertocoast.org.uk

Website: <https://www.bordertocoast.org.uk/>

Region: UKE42 - Leeds

Organisation type: Public authority - sub-central government