Supplier Prospectus | Lot 6: Costs Lawyer Services

Supplier	Phoenix Legal Services Limited
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PROSPECTUS NAVIGATION

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Disclosure disclaimer

Phoenix Legal Services confirms that the information included in this prospectus is not commercially sensitive. Where information is not already a matter of public record the appropriate permission will be obtained before the final prospectus is published.

WHO WE ARE

Supplier Introduction

Phoenix Legal Services Limited is an independent specialist costs law firm serving clients throughout the UK, with a head office in Cardiff. We are experts in all areas of costs law and work in partnership with clients providing specialist costs support throughout the life of a matter. Our services include paying party costs, budgeting and costs management, recovery of costs, auditing, advocacy, training, and consultancy.

We combine the flexibility of a specialist firm with the technical knowledge and commercial approach required for complex instructions. Our advice is always clear so that clients can properly understand the issues and recommendations that we provide. Costs Law can be complex, but our purpose is straightforward; reduce our clients' liabilities for costs, help buyers recover the maximum costs when available, and keep litigation costs on track.

What buyers can expect

- A named relationship lead committed to ensuring our service meets the client's needs.
- Plain English advice, focused on the decisions that have to be made.
- Transparent progress reporting and early identification of risks.
- Meaningful management information.
- Secure, digital-first working and the ability to support instructions remotely.
- A flexible service capable of supporting individual matters, portfolios, and defined review work.
- Work allocated at an appropriate level, with supervision and quality controls.

Our approach

Our experienced team takes a commercial, collaborative, and service-led approach. At the outset we agree the scope, priorities, objectives and reporting requirements. We allocate work at an appropriate level, maintain oversight of progress that allows us to identify risks promptly and make sure that our client understands the position and the direction each matter is headed in. All instructions are proactively managed and life cycle times are minimised. At conclusion we provide a clear output, identify any lessons to be learned and retain an auditable record of the work completed. MI is gathered and used to identify trends that will feedback to our staff, enabling us to constantly react, adapt and improve the quality of our work.

Supplier details

Phoenix Legal Services Limited | Company number 04867682 | Registered office: Southgate House, Wood Street, Cardiff, CF10 1EW | Switchboard: 02920 668664

Team Structure

Phoenix Legal Services uses a managed structure. Dean O'Connor, Managing Director and Supplier Framework Manager, is the Bid/Tender Contact. Phoenix Legal Services will not use Key Subcontractors for Lot 6.

KEY PERSONNEL



Dean O'Connor | Managing Director | Supplier Framework Manager

Dean is a highly experienced Costs Lawyer with more than 20 years' experience in complex and high-value costs matters. He is a leading expert in costs litigation, with extensive advocacy experience at detailed assessments, application hearings and costs management conferences. Dean has particular expertise in matters of a technical nature.



Liz Friston | Associate Legal Director | Authorised Representative, and Compliance Officer

Liz is a qualified Costs Lawyer with more than 25 years' experience and is one of Phoenix's leading experts in multi-party and specialist costs claims. Her work includes clinical negligence, police claims, judicial review, commercial litigation and Court of Appeal matters, and she is known for clear, precise advice praised by Judges for its clarity.



Michael Smith | Associate Practice Director | Data Protection Officer

Michael is a Member of CILEX and has a wealth of experience in legal spend audit, compliance and cost control. Michael has helped clients secure millions of pounds in savings and deductions, while implementing best-practice procedures for managing panel-firm costs.

Lot 6 Delivery Team



Andrea Ellis
Costs Draftsman and Team Leader



Sarah Barber
Costs Draftsman



Joe Haslam
Costs Draftsman



Gemma Cooke
Costs Draftsman



Kristan Maggs
Costs Lawyer and Team Leader



Nicola Thomas
Costs Lawyer and Team Leader



Karen Williamson
Costs Draftsman



Allison Ward
Costs Draftsman

Specialist delivery capacity

Service area	Named delivery team	Capacity
General Costs Law Services	Litigation and costs law team	11

Resourcing and resilience

- Work is allocated according to complexity, urgency, experience, and continuity, with line-manager supervision at key stages.
- Delivery can be supported securely from the Cardiff office and through remote working arrangements.
- Phoenix Legal Services operates an ISO 9001:2015-certified management system for the provision of legal costs services, with certification and annual compliance audits provided by Citation.
- Management oversight includes monthly file review and additional review triggers at key stages for specified contentious matters. Complex matters are proactively case managed.

RESPONSIBLE DELIVERY

Social Value

Phoenix Legal Services delivers social value through proportionate and measurable activities connected to its workforce, community, and environmental responsibilities.

Community and volunteering

- A staff-led charity committee develops fundraising and volunteering activities that are accessible to both office-based and remote colleagues.
- Planned activities include food bank volunteering, litter picks, and other community volunteering opportunities.
- Following staff consultation, the committee will nominate a charity of the year, with fundraising activity directed towards that charity. Phoenix has committed to matching funds raised at the end of each calendar year.
- Participation, outcomes, and objective achievement will be recorded so activity can be reported consistently and used to inform future initiatives.

Employment, skills and wellbeing

Phoenix Legal Services supports a skilled, stable and engaged workforce through structured supervision, role-specific development and flexible working arrangements. Our approach is designed to support service quality while helping colleagues develop professionally and maintain a healthy working environment.

- Providing role-specific training, supervision, and file review to support technical development, consistency, and service quality.
- Supporting flexible and remote working arrangements where operationally appropriate, helping colleagues balance business needs with wellbeing and work-life balance.
- Encouraging employee participation through staff consultation, internal communications, and opportunities to contribute to firm-wide initiatives.
- Maintaining a respectful and inclusive working environment, supported by clear expectations around communication, conduct, and collaboration.
- Reviewing wellbeing, workload, and engagement themes through management oversight so that issues can be identified and addressed appropriately.

Environmental stewardship

Phoenix Legal Services has published a Carbon Reduction Plan, confirming our commitment to achieving Net Zero emissions by 2050 and setting out how we will reduce our environmental impact in practice.

The plan records our 2024/25 baseline and current reporting footprint at 6.63 tCO_2e, made up of zero Scope 1 emissions, 1.99 tCO_2e Scope 2 emissions and 4.64 tCO_2e Scope 3 emissions. Against that baseline, Phoenix has committed to reducing absolute greenhouse gas emissions by 30% by 2030, with progress reviewed and reported annually.

The following measures support that target and reflect the practical steps already embedded in, or planned for, our working practices:

- Maintaining hybrid and remote working arrangements where operationally appropriate to reduce unnecessary commuting and support flexible service delivery.
- Using fully electric company vehicles, monitoring business mileage to identify opportunities for further reduction, and introducing staff initiatives to encourage greater uptake of electric vehicle use.
- Taking a digital-first approach to case management, including controlled printing, monitoring of paper and toner use, electronic bundles and digital court submissions.
- Reviewing mileage data annually, encouraging lower-carbon commuting options and engaging with landlords and suppliers on energy efficiency where Phoenix does not directly control building systems.
- Using high-quality carbon offsetting only as a supplementary measure for residual emissions that cannot yet be eliminated, while prioritising real, measurable emissions reductions.

Lot Experience Profile

Phoenix Legal Services provides specialist costs support for buyers who need additional capacity, independent scrutiny or targeted technical input at a particular stage of a matter. Our services reflect the full costs lifecycle, from budgeting and costs management through drafting, assessment, negotiation, auditing, advocacy and bespoke consultancy. These skills have been developed thanks to our experience in a huge number of instructions on behalf of the public sector, large and small.

Relevant capability

- **Paying Party Costs:** supporting buyers where costs are claimed against them, including assessment of liability, review of bills and supporting material, preparation of points of dispute, negotiation and support through provisional or detailed assessment.
- **Budgeting & Costs Management:** preparing and reviewing costs budgets, supporting costs management hearings, monitoring approved budgets and advising where developments require amendment, variation or reassessment.
- **Recovery of Costs:** helping buyers maximise their recovery by preparing schedules, formal bills, electronic bills and supporting documentation, advising on settlement strategy, negotiating costs disputes and supporting assessment proceedings.
- **Advocacy:** Expert legal representation at court
- **Auditing:** providing independent review of legal files, invoices and external legal spend, with exception reporting, management information and practical recommendations to improve compliance and control legal costs, including tracking trends and practices.
- **Consulting and Training**: providing bespoke costs training and independent consultancy advice on any costs issue arising throughout the life of a matter.

Experience relevant to public sector buyers

Phoenix Legal Services has experience of costs work for public-sector organisations and institutional clients. We are accustomed to working to agreed service levels, reporting requirements, escalation routes, confidentiality obligations and buyer-specific processes. The firm also supports audit and reporting activities for institutional clients.

Case study 1: public-sector costs instruction

Phoenix was instructed to challenge the costs claimed by a Claimant following the conclusion of an immigration claim. In Replies, the Claimant advanced a number of explanations to justify a budget overspend which were found to be factually inaccurate. The Defendant made submissions under CPR r.44.11 alleging misconduct during the detailed assessment process. The court agreed, finding that misconduct had occurred and imposing a penalty of a 30% reduction to the Claimant's provisionally assessed costs.

Case study 2: public-sector costs instruction

The Claimant claimed costs totaling £389,175.08 and proceeded to detailed assessment. During the assessment, the Claimant was unable to produce the documentation required to support significant elements of the costs claimed and subsequently sought agreement to accept an earlier Part 36 offer, together with liability for the Defendant's costs of the assessment proceedings, including the hearing. This resulted in a reduction of 58.89% against the costs originally claimed.

The findings were also fed back to the wider team and applied to other matters involving the same firm of solicitors, leading to further settlements being achieved with substantial reductions in costs.

LOT 6: COSTS LAWYER SERVICES

General Costs Law Services

COMPREHENSIVE SUPPORT ACROSS THE COSTS LIFECYCLE

Phoenix Legal Services provides General Costs Law Services for buyers acting as paying or receiving parties. We support routine, complex, and high-value matters from initial budgeting and exposure assessment through negotiation, assessment, and final resolution. Our team has a very broad range of experience across all of the public sector from specialist costs work in judicial reviews, volume work from PI claims, and bespoke instructions for smaller areas of government.

Relevant capability

- **Paying Party Costs:** Exposure assessment, bills review, points of dispute, negotiation and assessment support. Advice on QOCS matters.
- **Budgeting & Costs Management:** Budgets, negotiation, costs management hearings, monitoring and amendment advice.
- **Recovery of Costs:** Schedules, paper bills and electronic bills, replies, negotiation and assessment support.
- **Advocacy:** Expert legal representation at court
- **Auditing and Validation:** Independent review, validation, exception reporting and management information.
- **Mediation and Early Neutral Evaluation Services:** Independent mediating for cost disputes and independent non binding assessment of costs for the purpose of ADR.

Framework delivery

- Up to two hours' initial consultation at the start of each Call-Off Contract at no cost to the buyer.
- Matter management and an electronic billing process capable of providing LEDES or another requested structured format.
- Knowledge transfer and lessons learned at the conclusion of an instruction where required.
- At least one free training session or webinar per contract year, together with periodic costs know-how updates.

Named team

Dean O'Connor, Liz Friston, Michael Smith, Andrea Ellis, Sarah Barber, Joe Haslam, Gemma Cooke, Kristan Maggs, Nicola Thomas, Karen Williamson and Allison Ward