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Tender

Insurance Broker Services (P25-0059)

Scottish Enterprise

F02: Contract notice

Notice identifier: 2025/S 000-004160

Procurement identifier (OCID): ocds-h6vhtk-04dcbb

Published 7 February 2025, 12:45pm

Section I: Contracting authority

I.1) Name and addresses

Scottish Enterprise

Atrium Court, 50 Waterloo Street

Glasgow

G2 6HQ

Contact

Adam Cunningham

Email

adam.cunningham@scotent.co.uk

Country

United Kingdom

NUTS code

UKM82 - Glasgow City

Internet address(es)

Main address

<http://www.scottish-enterprise.com/>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00398

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<http://www.publiccontractsscotland.gov.uk>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<http://www.publiccontractsscotland.gov.uk>

I.4) Type of the contracting authority

Regional or local Agency/Office

I.5) Main activity

Economic and financial affairs

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Insurance Broker Services (P25-0059)

Reference number

P25-0059

II.1.2) Main CPV code

- 66518100 - Insurance brokerage services

II.1.3) Type of contract

Services

II.1.4) Short description

Scottish Enterprise is seeking to appoint a professional and expert insurance broker to act as our contracted Agent and oversee all insurance related activity on our behalf, with input and agreement from our nominated staff as needed. This will include:

- (i) Professional advice on insurance market and risks which are appropriate to our current and future business activities.
- (ii) Procuring and placing annual insurance policies on our behalf.
- (iii) Handling any claims, or insurance related queries
- (iv) Deal with all insurance related matters in connection with the SE Investment property portfolio.

Full details of the requirements can be found within the Invitation to Tender (ITT).

It is anticipated that the contract will commence on 1 June 2025 for an initial period of 3 years to 31 May 2028, with the potential to extend the contract by mutual agreement for a further 2 x 12-month periods up to a final contract end date of 31 May 2030. An existing contract with our current insurer is due to expire on 31 May 2025.

The estimated value within II.1.5 of the Contract Notice includes the estimated costs of the insurance policies in addition to any fees.

II.1.5) Estimated total value

Value excluding VAT: £3,250,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66518100 - Insurance brokerage services
- 66518000 - Insurance brokerage and agency services
- 66510000 - Insurance services
- 66500000 - Insurance and pension services
- 66519310 - Insurance consultancy services
- 66000000 - Financial and insurance services
- 66514000 - Freight insurance and Insurance services relating to transport
- 66515200 - Property insurance services
- 66516000 - Liability insurance services
- 66512100 - Accident insurance services
- 66515000 - Damage or loss insurance services
- 66513100 - Legal expenses insurance services
- 66514110 - Motor vehicle insurance services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Scottish Enterprise is seeking to appoint a professional and expert insurance broker to act as our contracted Agent and oversee all insurance related activity on our behalf, with input and agreement from our nominated staff as needed. This will include:

- (i) Professional advice on insurance market and risks which are appropriate to our current and future business activities.
- (ii) Procuring and placing annual insurance policies on our behalf.
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The estimated value within II.1.5 of the Contract Notice includes the estimated costs of the insurance policies in addition to any fees.

II.2.5) Award criteria

Quality criterion - Name: Prompt Payment (only relevant where sub-contractors are proposed) / Weighting: Pass/Fail

Quality criterion - Name: Project Team Structure and Specific Experience to be used in the delivery of the services required / Weighting: 30%

Quality criterion - Name: Methodology including Innovation / Weighting: 25%

Quality criterion - Name: Timetable including milestones for objectives / Weighting: 25%

Quality criterion - Name: Net Zero and Sustainability / Weighting: 5%

Quality criterion - Name: Fair Work First / Weighting: 5%

Quality criterion - Name: Business Continuity / Weighting: 5%

Quality criterion - Name: Information Security / Weighting: 5%

Price - Weighting: 30

II.2.6) Estimated value

Value excluding VAT: £3,250,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

2 x 12-month extension options

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2.14) Additional information

The estimated value within II.1.5 of the Contract Notice includes the estimated costs of the insurance policies in addition to any fees.

Economic operators may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015.

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

SPD Question 4A2A: Bidders should provide details on the memberships and/or accreditations held, along with any authorisations by regulatory or professional bodies that are relevant to the delivery of the services required.

III.1.2) Economic and financial standing

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland online module.

III.1.3) Technical and professional ability

List and brief description of selection criteria

The relevant selection criteria will be included in the SPD Scotland online module.

III.2) Conditions related to the contract

III.2.3) 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

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

12 March 2025

Local time

11:00am

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 3 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

12 March 2025

Local time

12:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.3) Additional information

As detailed in the SPD module, this is a relevant climate change contract, bidders are required to complete and return the Climate Change Plan template included within the Additional Documents section of the Contract Notice.

SPD statement for 2A.17 – Form of Participation (Notably as part of a group, consortium, joint venture or similar).

Any contract will be entered into with the nominated lead organisation and all members of the consortium, who will in these circumstances each be required to execute said contract together with all ancillary documentation, evidencing their joint and several liability in respect of the obligations and liabilities of the contract. It will be for members of the consortium to sort out their respective duties and liabilities amongst each other. For administrative purposes, any associated documentation will be sent to the nominated lead organisation.

SPD statement for 2C.1 - Where the main bidder relies on the capacities of other entities in order to meet the selection criteria, the bidder must provide a separate SPD response setting out the information required under SPD (Scotland): Part II (sections A and B); Part III exclusion grounds; the relevant part of Section IV selection criteria; and Part V (if applicable) for each of the entities concerned.

SPD statement for 2D.1 – If the bidder proposes to subcontract any part(s) of the service and those sub-contractors are not relied upon, they should arrange for a separate SPD response from each potential subcontractor. The subcontractors must complete the relevant parts of the SPD (Scotland) (Sections A and B of Part II and Part III only) to self-declare whether there are grounds for their exclusion.

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=789670.

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx.

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(SC Ref:789670)

Download the ESPD document here:

https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=789670

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court and Justice of the Peace Court

Sheriff Clerk's Office, PO Box 23, 1 Carlton Place

Glasgow

G5 9DA

Telephone

+44 1414298888

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk/the-courts/court-locations/glasgow-sheriff-court-and-justice-of-the-peace-court>

VI.4.2) Body responsible for mediation procedures

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

In the first instance, contact the Head of Facilities Management and Procurement at Scottish Enterprise, with any concerns or enquiries. Email: <https://www.scottish-enterprise.com/help/contact-us>.

VI.4.4) Service from which information about the review procedure may be obtained

Scottish Government

5 Atlantic Quay, 150 Broomielaw

Glasgow

G2 8LU

Email

SPOEprocurement@scotland.gsi.gov.uk

Telephone

+44 1412425466

Country

United Kingdom

Internet address

<http://www.gov.scot/Topics/Government/Procurement/Selling/supplier-enquiries>