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Tender

## **Insurance and Related Services 2022**

Port of Leith Housing Association Ltd

F02: Contract notice

Notice identifier: 2022/S 000-021697

Procurement identifier (OCID): ocds-h6vhtk-0359b7

Published 8 August 2022, 11:39am

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Port of Leith Housing Association Ltd

108 Constitution Street, Leith

Edinburgh

EH6 6AZ

#### **Contact**

Our Consultant - Maureen Batten

#### **Email**

[maureenmbatten@gmail.com](mailto:maureenmbatten@gmail.com)

#### **Telephone**

+44 1315540403

**Fax**

+44 1315551504

**Country**

United Kingdom

**NUTS code**

UKM75 - Edinburgh, City of

**Internet address(es)**

Main address

<http://www.polha.co.uk/>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA13142](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA13142)

**I.3) Communication**

Access to the procurement documents is restricted. Further information can be obtained at

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

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

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

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Housing and community amenities

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Insurance and Related Services 2022

#### **II.1.2) Main CPV code**

- 66510000 - Insurance services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

The Contract is for the provision of general insurance and related services, including claims handling, loss control services and general programme maintenance and advice as required by Port of Leith Housing Association and its subsidiaries (PoLHA) commencing 31 December 2022. A full Summary of Current Cover will be provided with the Invitation to Tender to selected bidders. Bids are invited from suitably qualified insurance brokers and direct providers for the entire scope of services. The procurement will follow the two-stage Restricted Procedure with a pre-qualifying stage based on completed SPDs and bidders will be selected on the basis of their capability, capacity and experience to perform the contract.

#### **II.1.5) Estimated total value**

Value excluding VAT: £1,050,000

#### **II.1.6) Information about lots**

This contract is divided into lots: No

### **II.2) Description**

#### **II.2.2) Additional CPV code(s)**

- 66512100 - Accident insurance services
- 66513000 - Legal insurance and all-risk insurance services

- 66513200 - Contractor's all-risk insurance services
- 66514110 - Motor vehicle insurance services
- 66515000 - Damage or loss insurance services
- 66515300 - Weather and financial loss insurance services
- 66515410 - Financial loss insurance services
- 66516000 - Liability insurance services
- 66516100 - Motor vehicle liability insurance services
- 66516400 - General liability insurance services
- 66515200 - Property insurance services
- 66518100 - Insurance brokerage services
- 66519200 - Engineering insurance services
- 66513100 - Legal expenses insurance services
- 66515411 - Pecuniary loss insurance services

### **II.2.3) Place of performance**

NUTS codes

- UKM75 - Edinburgh, City of

Main site or place of performance

Edinburgh, Scotland

### **II.2.4) Description of the procurement**

The scope of the Contract includes the provision of insurance cover, brokerage services (where applicable), professional advice, claims management and loss control services for property, legal liabilities, engineering insurance and inspection and other general(non-life)

insurances as required by PoLHA for a period of 3 years commencing 1.12.2022, with the option to extend by up to a further 2 years at PoLHA's sole discretion. The contract is not

divided into lots so bidders are required to bid for the entire scope of services. Bids are invited from suitably qualified and experienced insurance brokers and direct insurers. The Contract will follow the two-stage Restricted Procedure with bidders being selected on the basis of the responses contained in the pre-qualifying SPD. Bidders will be expected have the capability, capacity, financial and economic standing and experience to perform the contract. SPDs must be completed in full with all relevant information supplied. The Contract will be awarded on the basis of Most Economically Advantageous Tender, with specific evaluation criteria detailed within the Invitation To Tender and contract documents.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **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

The contract will be for an initial 3 year period with the option to extend for a further two years at PoLHA's sole

discretion. Renewal will be sought at the end of the three or five year period.

### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 6

Objective criteria for choosing the limited number of candidates:

Number of suitably qualified and accredited bidders with appropriate economic and financial standing and technical capacity to provide the services

### **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**

A Summary of PoLHA's current insurances will be made available along with the Invitation to Tender. Bidders are required to submit the appropriate SPD, completed in full in order to be considered for Stage 2 of the procurement

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## **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

As a minimum, you are required to demonstrate:

- 1) you are an insurance broker registered with and regulated by the UK Financial Conduct Authority or an insurer authorised /and or regulated by the UK Financial Conduct Authority indicating the types of insurance/service the bidder is authorised to arrange or provide (See question 4a of SPD)
- 2) the financial ability and strength to deliver the programme (see question 4b of SPD)

- 3) the governance arrangements of the bidding organisation and where part of a larger Group, the title, positioning and legal status of the bidding organisation within that Group
- 4) the ability to provide social landlords with a choice of insurers and/or options
- 5) a record of successful provision of relevant services to other organisations that are similar in profile to the contracting authority (see question 4C1 of SPD)
- 6) a skilled and competent service team, being client relationship management, technical staff, broking/underwriting expertise, claims managers and risk managers (see question 4C 2-6 of SPD)
- 7) your commitment to delivering quality service to PoLHA, including that provided by any third party contractor employed by you or by the insurers you propose (see question 4D of SPD)
- 8) your ability to demonstrate client satisfaction on at least 3 similar contracts
- 9) commitment to corporate and individual professional development defined by the CII or similar professional organisation (see questions 4c&4D of SPD)

### **III.1.2) Economic and financial standing**

List and brief description of selection criteria

See questions at 4B of SPD

Minimum level(s) of standards possibly required

Information and formalities necessary for evaluating if requirements are met:

- (1) All candidates will be required to provide evidence of relevant professional indemnity insurance (minimum of 5m GBP) and Public Liability Insurance (minimum 10m GBP) and Employer's Liability Insurance 10m GBP
- (2) All candidates will be required to provide a statement, covering the 3 previous financial years including the overall turnover of the bidder and the turnover in respect of the activities which are of a similar type to the subject matter of this notice.
- (3) All candidates will be required to provide statements of accounts or extracts from those accounts relating to their business.
- (4) all candidates will give a clear description of the bidding company's status within any larger Group, where appropriate.

(4) Financial ratings of all risk carriers must be provided within Tender responses.

### **III.1.3) Technical and professional ability**

List and brief description of selection criteria

See questions at 4C of SPD. Minimum level(s) of standards required:

1) A statement of the bidder's average annual number of staff and managerial staff over the previous 3 years in the part of any Group proposing to deliver the service

(2) Details of the educational and professional qualifications of their managerial staff; and those of the person(s) who would be responsible for providing the services specified within this Contract or carrying out the work under the contract;

(3) An indication of the proportion of the contract which the services provider intends possibly to subcontract

## **III.2) Conditions related to the contract**

### **III.2.1) Information about a particular profession**

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

Bidders must be either an insurance broker registered with and regulated by the UK Financial Conduct Authority or an insurer authorised/and or regulated by the UK Financial Conduct Authority indicating the types of insurance/service the bidder is authorised to arrange or provide.

### **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



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## **Section IV. Procedure**

### **IV.1) Description**

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

Restricted 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

7 September 2022

Local time

3:00pm

#### **IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates**

9 September 2022

#### **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**

Tender must be valid until: 1 December 2022

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## **Section VI. Complementary information**

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

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: 36 or 60 months

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

Bidders should note that for reasons of confidentiality, full Tender specification and supporting information will be made available only to those Bidders that are selected to proceed to the Invitation to Tender Stage. Sufficient detail is provided within this Contract Notice and within the SPD to enable the Bidder to decide whether to participate in this process.

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=702177](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=702177).

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](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:702177)

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

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

Edinburgh Sheriff Court and Justice of the Peace

Sheriff Court House 27 Chambers Street

Edinburgh

EH1 1LB

Country

United Kingdom

Internet address

<https://www.scotcourts.gov.uk>