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Tender

Insurance, Brokerage and Associated Risk Management Framework Agreement

APUC Limited

F02: Contract notice

Notice identifier: 2024/S 000-029252

Procurement identifier (OCID): ocds-h6vhtk-049a5d

Published 12 September 2024, 2:07pm

The closing date and time has been changed to:

4 November 2024, 9:00am

See the [change notice](#).

Section I: Contracting authority

I.1) Name and addresses

APUC Limited

Unit 27, Stirling Business Centre, Wellgreen

Stirling

FK8 2DZ

Contact

Ola McIntyre

Email

omcintyre@apuc-scot.ac.uk

Telephone

+44 1314428930

Country

United Kingdom

NUTS code

UKM77 - Perth & Kinross and Stirling

Internet address(es)

Main address

<http://www.apuc-scot.ac.uk>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA10402

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

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

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

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Education

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Insurance, Brokerage and Associated Risk Management Framework Agreement

Reference number

PFB1043 AP

II.1.2) Main CPV code

- 66510000 - Insurance services

II.1.3) Type of contract

Services

II.1.4) Short description

APUC is seeking Contractor(s) for Insurance, Brokerage and Associated Risk Management Services Framework Agreement, which will provide the Scottish universities and colleges and other participating bodies, with a mechanism to procure insurance services, brokerage services and related risk management services.

Other participating bodies include:

- Highlands and Islands Enterprise
- National Records Scotland
- Royal Botanic Gardens
- Social Care & Social Work Improvement Services known as the Care Inspectorate
- Skills Development Scotland
- The Scottish Parliamentary Corporate Body.

II.1.5) Estimated total value

Value excluding VAT: £20,000,000

II.1.6) Information about lots

This contract is divided into lots: Yes

Tenders may be submitted for all lots

II.2) Description

II.2.1) Title

Insurance Services

Lot No

1

II.2.2) Additional CPV code(s)

- 66510000 - Insurance services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

II.2.4) Description of the procurement

Full range of insurance services provision for the main insurance covers including, but not limited to:

- Pre-contract discussion
- Risk assessment and evaluation
- Negotiation of premiums and covers

- Provision of insurance summary reports
- Claims Management
- Regular reviews
- Insurance and risk management advice and guidance
- Risk portfolio management.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70%

Price - Weighting: 30%

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 Authority reserves the right to extend the Framework Agreement for a period of up to 12 months subject to satisfactory performance and continued Institutions requirements.

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: Yes

Identification of the project

Potential EU funding may be used to procure under this Framework Agreement.

II.2) Description

II.2.1) Title

Brokerage Services

Lot No

2

II.2.2) Additional CPV code(s)

- 66518100 - Insurance brokerage services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

II.2.4) Description of the procurement

Provision of insurance brokerage services including, but not limited to:

- Insurance consultancy and advice
- Data collection and preparation of underwriting reports
- Access to the insurance market
- Insurance placement and premium collection
- Claims handling support

- Risk review
- Tendering support.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70%

Price - Weighting: 30%

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 Authority reserves the right to extend the Framework Agreement for a further 12-month period subject to satisfactory performance and continued Institutions requirements.

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: Yes

Identification of the project

The Authority reserves the right to extend the Framework Agreement for a further 12-month period subject to satisfactory performance and continued Institutions requirements.

II.2) Description

II.2.1) Title

Insurance and Risk Management Associated Services

Lot No

3

II.2.2) Additional CPV code(s)

- 66517300 - Risk management insurance services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

II.2.4) Description of the procurement

Provision of related insurance and risk management associated services, not already included in the insurance proposition in the other lots, including, but not limited to:

- Advice and guidance on insurance requirements in procurement exercises
- Advice and guidance on liability limitations in terms and conditions
- Insurance and risk training provision to non-insurance specialists
- Business continuity planning consultancy
- Risk management consultancy.

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 70%

Price - Weighting: 30%

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 Authority reserves the right to extend the Framework Agreement for a further 12-month period subject to satisfactory performance and continued Institutions requirements.

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: Yes

Identification of the project

Potential EU funding may be used to procure under this Framework Agreement.

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

With reference to question 4A.2 of the SPD in the qualification questionnaire, bidders must confirm that they are authorised and regulated by the UK Prudential Regulation Authority or Financial Conduct Authority.

III.1.2) Economic and financial standing

Minimum level(s) of standards possibly required

Please refer to the “Qualification Envelope” of the ITT within PCS-T to answer the selection criteria.

Please refer to Part IV Selection Criteria: Questions within 4B.5 of the SPD

Tenderers must confirm they can provide the following supporting evidence prior to award:

Employer's (Compulsory) Liability Insurance = GBP 5 Million

Public Liability Insurance = GBP 5 Million

Professional Risk Indemnity Insurance = GBP 1 Million

With reference to SPD question 4B.6 - The successful Contractor(s) will be required to provide two years audited accounts, or equivalent if awarded a place on the Framework Agreement. Alternatively, if the Contractor is unable to provide the required accounting information e.g. a new business without the required accounts, then they will be required to provide a bankers letter demonstrating their willingness to support the Contractors organisation over the term of the Framework Agreement. The two years audited accounts, or equivalent will be subject to ratio analysis.

III.1.3) Technical and professional ability

Minimum level(s) of standards possibly required

Tenderers must confirm they have (or have access to) the relevant supply chain management and tracking systems to ensure a resilient and sustainable supply chain. This includes confirmation that they have the systems in place to pay subcontractors through the supply chain promptly (i.e. no later than 30 days after the invoice (or similar claim) relating to the payment is presented) and effectively, and provide evidence when requested of:

a) their standard payment terms

b) $\geq 95\%$ of all supply chain invoices being paid on time (in accordance with the terms of contract) in the last financial year.

If the bidder is unable to confirm (b) they must provide an improvement plan, signed by their Director, which improves the payment performance.

III.2) Conditions related to the contract

III.2.2) Contract performance conditions

Submission of Management Information Following commencement of the Framework Agreement, the Contractor will provide a performance report to the Authority on a quarterly basis to include spend by Institution under the Framework Agreement for the reporting period. Contractors must provide the information on a quarterly basis, within 10 working days following the start of each quarter. Data must be uploaded to the website: <http://ucsp.ac.uk/>

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

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

Originally published as:

Date

24 October 2024

Local time

12:00pm

Changed to:

Date

4 November 2024

Local time

9:00am

See the [change notice](#).

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: 6 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

24 October 2024

Local time

1:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: July 2028

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.3) Additional information

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.

Suppliers should confirm they will be in a position to complete (at point of award) the following:

Appendix A Form of Tender

Appendix B Freedom of Information

Appendix D APUC Sustain Supply Chain Code of Conduct

Appendix J SCM RP Section 1

The buyer is using PCS-Tender to conduct this ITT exercise. The Project code is 27145. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

The Contracting Authority does not intend to include a sub-contract clause as part of community benefits (as per Section 25 of the Procurement Reform (Scotland) Act 2014) in this contract for the following reason:

It is a requirement that the range of services to be delivered under this framework agreement will be delivered by each of the main contractors.

Community benefits are included in this requirement. For more information see:
<https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

Bidders will be asked to offer added value activities including, but not limited to, providing support and assistance to build resilience in the Institutions local community (providing services, guidance and/or assistance to communities local to Institutions on matters related to the management of risks).

(SC Ref:773100)

VI.4) Procedures for review

VI.4.1) Review body

Stirling Sheriff Court and Justice of the Peace Court

Sheriff Court House,

Stirling

Fk8 1NH

Email

stirling@scotcourts.gov.uk

Telephone

+44 01786462191

Country

United Kingdom