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Tender

## **Insurance and Related Services 2025**

Glen Oaks Housing Association

F02: Contract notice

Notice identifier: 2024/S 000-034845

Procurement identifier (OCID): ocds-h6vhtk-04b1cd

Published 28 October 2024, 12:33pm

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

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

Glen Oaks Housing Association

3 Kilmuir Dr, Thornliebank

Glasgow

G46 8BW

#### **Contact**

Andy Bygrave

#### **Email**

[andy.bygrave@gibbslaidler.co.uk](mailto:andy.bygrave@gibbslaidler.co.uk)

#### **Telephone**

+44 1959562242

#### **Country**

United Kingdom

**NUTS code**

UK - United Kingdom

**Internet address(es)**

Main address

<https://www.gibbslaidler.co.uk/>

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA30717](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA30717)

**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.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 2025

#### **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 Glen Oaks Housing Association commencing 1st April 2025. 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.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for maximum number of lots

4

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

#### **II.2.1) Title**

Insurance and related services associated with property, legal liability and other general (non-life) insurable risks as required by Glen Oaks Housing Association

Lot No

1

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

- 66510000 - Insurance services
- 66515200 - Property insurance services
- 66518100 - Insurance brokerage services
- 66516400 - General liability insurance services
- 66516000 - Liability insurance services
- 66515410 - Financial loss insurance services
- 66515411 - Pecuniary loss insurance services
- 66513000 - Legal insurance and all-risk insurance services
- 66512100 - Accident insurance services
- 66515000 - Damage or loss insurance services
- 66515300 - Weather and financial loss insurance services
- 66513100 - Legal expenses insurance services

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

NUTS codes

- UKM82 - Glasgow City

### **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 and other general insurances as required by Glen Oaks Housing Association for a period of three years commencing 01.04.2025, with the option to extend by up to a further two years at Glen Oaks Housing Association's sole discretion. Bids are invited from suitably qualified and experienced insurance brokers and direct insurers. The Contract will follow the two-stage Competitive Procedure with Negotiation 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 three year period with the option to extend for a further two years at Glen Oaks Housing Association'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 number of candidates: 3

#### **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 Glen Oaks 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

## **II.2) Description**

### **II.2.1) Title**

Insurance and related services associated with Terrorism and/or Political Violence (Pool-Re) as required by Glen Oaks Housing Association

Lot No

2

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

- 66510000 - Insurance services
- 66513000 - Legal insurance and all-risk insurance services
- 66515200 - Property insurance services
- 66518100 - Insurance brokerage services

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

NUTS codes

- UKM82 - Glasgow City

### **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 terrorism/political violence (Pool Re) as required by Glen Oaks Housing Association for a

period of three years commencing 01.04.2025, with the option to extend by up to a further two years at Glen Oaks Housing Association's sole

discretion. Bids are invited from suitably qualified and experienced insurance brokers and

direct insurers. The Contract will follow the

two-stage Competitive Procedure with Negotiation 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 three year period with the option to extend for a further two years at Glen Oaks 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 number of candidates: 3

#### **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 Glen Oaks 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

## **II.2) Description**

### **II.2.1) Title**

Insurance and related services associated with Terrorism and/or Political Violence (Non Pool-Re) as required by Glen Oaks Housing Association

Lot No

3

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

- 66518100 - Insurance brokerage services
- 66516400 - General liability insurance services
- 66516000 - Liability insurance services
- 66515410 - Financial loss insurance services
- 66515411 - Pecuniary loss insurance services
- 66510000 - Insurance services

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

NUTS codes

- UKM82 - Glasgow City

### **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 terrorism/political violence (Non Pool Re) as required by Glen Oaks Housing Association Ltd for a period of three years commencing 01.04.2025, with the option to extend by up to a further two years at Glen Oaks Housing Association's sole discretion. Bids are invited from suitably qualified and experienced insurance brokers and direct insurers. The Contract will follow the two-stage Competitive Procedure with Negotiation 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 three year period with the option to extend for a further two years at Glen Oaks Housing Association 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 number of candidates: 3

**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 Glen Oaks Housing Association'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

**II.2) Description**

**II.2.1) Title**

Insurance and related services associated with Cyber Risk as required by Glen Oaks Housing Association

Lot No

4

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

- 66518100 - Insurance brokerage services
- 66516400 - General liability insurance services
- 66516000 - Liability insurance services
- 66515410 - Financial loss insurance services
- 66515411 - Pecuniary loss insurance services
- 66510000 - Insurance services

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

NUTS codes

- UKM82 - Glasgow City

### **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 cyber liability and related services as required by Glen Oaks Housing Association Ltd for a period of three years commencing 01.04.2025, with the option to extend by up to a further two years at Glen Oaks Housing Association's sole discretion.

Bids are invited from suitably qualified and experienced insurance brokers and direct insurers. The Contract will follow the two-stage

Competitive Procedure with Negotiation 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 three year period with the option to extend for a further two years at Glen Oaks Housing Association'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 number of candidates: 3

#### **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 Glen Oaks Housing Association'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

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 4C1.2 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 4C6 of SPD)

7) your commitment to delivering quality service to Glen Oaks Housing Association, including that provided by any third party contractor

employed by you or by the insurers you propose (see question 4C10 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

Minimum level(s) of standards required:

(1) All candidates will be required to provide evidence of relevant insurance limits as detailed in the SPD

(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.

(5) Financial ratings of all risk carriers must be provided within Tender response

### **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 possibly required

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**

Competitive procedure with negotiation

#### **IV.1.5) Information about negotiation**

The contracting authority reserves the right to award the contract on the basis of the initial tenders without conducting negotiations

#### **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

29 November 2024

Local time

12:00pm

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

10 December 2024

#### **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 April 2025

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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: Between three or five years, from the date of this notice.

### **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

[www.publiccontractsscotland.gov.uk](http://www.publiccontractsscotland.gov.uk)

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.

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=781255](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=781255)

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[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.

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:

Information will be included in the Invitation to Tender at the next stage of the 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=781255](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=781255).

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[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:781255)

Download the ESPD document here:

[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=781255](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=781255)

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

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

Glasgow Sheriff Court

1 Carlton Place

Glasgow

G5 9DA

Email

[glasgow@scotcourts.gov.uk](mailto:glasgow@scotcourts.gov.uk)

Telephone

+44 1414298888

Country

United Kingdom