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Tender

## **Insurance Broker Services**

Glasgow City Council

F02: Contract notice

Notice identifier: 2022/S 000-035662

Procurement identifier (OCID): ocds-h6vhtk-0391ec

Published 16 December 2022, 12:39pm

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

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

Glasgow City Council

Chief Executives Department, City Chambers

Glasgow

G2 1DU

#### **Contact**

Laura Moffat

#### **Email**

[laura.moffat2@glasgow.gov.uk](mailto:laura.moffat2@glasgow.gov.uk)

#### **Telephone**

+44 1412876410

#### **Country**

United Kingdom

**NUTS code**

UKM82 - Glasgow City

**Internet address(es)**

Main address

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

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA00196](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00196)

**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

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

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

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

Regional or local authority

**I.5) Main activity**

General public services

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## **Section II: Object**

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

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

Insurance Broker Services

Reference number

GCC005513CPU

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

- 66518100 - Insurance brokerage services

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

Services

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

The Council is seeking an Insurance Broker to commercially procure, place and negotiate terms of cover, premiums and related matters within the insurance market on the Council's behalf. The Broker will also be responsible for liaising with insurers, claims handlers and loss adjusters, developing current systems to produce certificates of insurance, premium invoices, providing advice, guidance and support to the Council and their Arms Length Organisations (ALEO's) and all other associated activities.

The estimated contract value includes the broker fee and total policy value. The broker fee is estimated at 700k for the duration of the contract including extensions. The total policy value is estimated to be between 48m and 56m for the duration of the contract including extensions. The range reflects variations in policy requirements and coverage that may occur.

The procurement will be undertaken via the Public Contracts Scotland - Tender portal (PCS-T).

Bidders must self-certify their adherence to the conditions of participation via the SPD (Scotland) in PSC-T, and may be required to submit Means of Proof before contract award. Bidders must refer to the specific requirements listed in Section III in this Contract Notice when completing the SPD in PCS-T.

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

Value excluding VAT: £56,700,000

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

This contract is divided into lots: No

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

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

- 66510000 - Insurance services

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

NUTS codes

- UKM82 - Glasgow City

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

The Council is seeking an Insurance Broker to commercially procure, place and negotiate terms of cover, premiums and related matters within the insurance market on the Council's behalf. The Broker will also be responsible for liaising with insurers, claims handlers and loss adjusters, developing current systems to produce certificates of insurance, premium invoices, providing advice, guidance and support to the Council and their Arms Length Organisations (ALEO's) and all other associated activities.

The Broker will be required to assess, recommend and place all classes of insurance as needed as well as providing professional advice and guidance on risk management and other related areas. The supplier will act as a broker on behalf of the Council, their client.

The estimated contract value includes the broker fee and total policy value. The broker fee is estimated at 700k for the duration of the contract including extensions. The total policy value is estimated to be between 48m and 56m for the duration of the contract including extensions. The range reflects variations in policy requirements and coverage that may occur.

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

Quality criterion - Name: Mobilisation & Service Commencement / Weighting: 6

Quality criterion - Name: Methodology / Weighting: 16

Quality criterion - Name: Team & Account Management / Weighting: 18

Quality criterion - Name: Risk Management / Weighting: 10

Quality criterion - Name: Added Value & Training / Weighting: 10

Quality criterion - Name: Continuous Improvement / Weighting: 5

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

Price - Weighting: 30

#### **II.2.6) Estimated value**

Value excluding VAT: £56,700,000

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

Duration in months

84

This contract is subject to renewal

Yes

Description of renewals

The contract duration is for 2 years with the option to extend for a period of 2 years and subsequent 3 years (7 years in total)

#### **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**

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.

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

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

List and brief description of selection criteria

Insurance and other Financial Requirements - Please refer to the ITT document

Minimum level(s) standards required;

Employer's (Compulsory) Liability Insurance = 10 million GBP

Public Liability Insurance = 5 million GBP

Professional Indemnity Insurance = 1 million GBP

Bidders must comply with the undernoted financial requirements in order to participate further in the tendering process: -

There is a minimum financial requirement that affects trading performance, balance sheet strength and current liquidity

Financial requirements for trading performance and balance sheet strength should be calculated on latest filed accounts with Companies House.

#### **Trading Performance**

An overall positive outcome on pre tax profits over a 3 year period

Exceptional items can be excluded from the calculation.

The above would be expressed in the ratio Pre-Tax Profit/Turnover.

#### **Balance Sheet Strength**

Net worth of the organisation must be positive at the time of evaluation and organisation must not be subject to an insolvency process.

Intangibles can be included for purposes of the Total Assets figure.

The above would be expressed in the ratio Total Assets/Total Liabilities

If a Bidder is only required to file abbreviated accounts with Companies House, then in the event of the company being successful in the procurement process, full set of accounts will be required in order to verify the above ratios have been complied with.

A Bidder should have no outstanding issues, with regard to statutory filing requirements with Companies House.

Bidders who have been trading for less than the 3 years noted above must provide evidence that they are complying with the above minimum financial requirements for the period in which they have been trading.

Bidders who do not comply with the above financial requirements but are part of a Group, can provide a Parent Guarantee if the Parent company satisfies the financial requirements stipulated above.

If the pandemic has had an adverse effect on the latest set of accounts filed with Companies House, the council will take that into account in determining financial suitability for the contract. The above, however, should not impinge on the financial viability of the company, as defined by the ratios set out in the above financial requirements.

The council reserves the right, at its own discretion, to seek such other information from the Bidder in accordance with Regulations 61(7) or Regulation 61 (8) of the Public Contracts (Scotland) Regulations 2015 to prove the Bidder's economic and financial standing

Any Bidder that fails to achieve or exceed the criteria as stated above will be excluded at this stage.

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

List and brief description of selection criteria

Bidders must be registered with the Financial Conduct Authority (FCA)

Bidders will be required to provide examples that demonstrate that they have the relevant experience to deliver the services as described in this Contract Notice and as further detailed in the Invitation to Tender.

Bidders must provide a detailed response to questions 4C1.2 of the Scottish Procurement Document (SPD) noted in the Qualification Envelope of the PCS-T system and as detailed below;

Please provide 2 relevant examples, broadly similar in scale and complexity, of services carried out during the last 3 years as specified in the Contract Notice.

Examples from both public and/or private sector customers and clients may be provided

The examples should highlight all relevant and applicable skills, expertise and capacity to deliver the scope of requirements.

Your examples should include but are not limited to the following details; Customer name, value of contract and start and end dates and Brief description of services provided

Additionally, the examples should highlight experience that demonstrates;

- Capability and expertise in accessing all market providers and in assessing and arranging all types/classes of insurance

Please also detail any management agents used in the delivery of these services and their role

Each example is worth 50%. A minimum pass mark of 60% out of 100% is required in total for these two examples. Any Bidder who fails to achieve the minimum pass mark for this element will be excluded at this stage.

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

### **III.2.2) Contract performance conditions**

Please see the Invitation to Tender uploaded in the Suppliers Attachment Area of PCS-T for full details of the performance measurement and monitoring plans for this contract.



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## **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

23 January 2023

Local time

12:00pm

#### **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: 4 (from the date stated for receipt of tender)

#### **IV.2.7) Conditions for opening of tenders**

Date

23 January 2023

Local time

12:00pm

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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: The contract duration is for 2 years with an option to extend for a further period of 2 years and a subsequent period of 3 years

### **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**

Bidders must hold certificates for Quality Assurance & Environmental Management Standards or comply with all questions noted in SPD Section. 4D. Bidders must note the implications FOI legislation & ensure that any info they wish the council to consider withholding is indicated. (NB the council does not bind itself to withhold this info). Tenderers Amendments- Bidders must enter any clause, condition, amendment to specification or any other qualification they may wish to make conditional to this offer within the Tenderers Amendment statement on PCS-T. Prompt Payment -The successful tenderer shall, as a condition of being awarded, be required to demonstrate to the council's satisfaction that all funds due permitted sub-contractors are paid timeously and as a minimum, invoices rendered by subcontractors shall be paid within 30 days of receipt. The successful tenderer shall also impose this condition on its sub-contractors in respect of payments due to any sub-sub-contractors. Bidders will be required to complete the prompt payment statement and Non-collusion statement within PCS-T. All bidders will be required to sign an Insurance Mandate within PCS-T. If is not signed & returned the council reserves the right to request copies of certificates at any point during the contract period. T&C are located within the buyers attachment area of PCS-T. The buyer is using PCS-Tender to conduct this exercise. For more information see:

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

Community benefits are included in this requirement. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2361>

For this procurement, the minimum total number of Community Benefit points required for

the total contract duration including all extension periods is 50.

Bidders must confirm that they will meet these obligations in full by completing the relevant areas within the Community Benefits Menu.

Bidders are also required to provide a supporting Methodology for each of the Themes they are offering from the Menu, detailing how the Community Benefit outcomes will be delivered

The buyer is using PCS-Tender to conduct this ITT exercise. The Project code is 22868. For more information see:

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

A sub-contract clause has been included in this contract. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2363>

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:

Community Benefits have been included as a mandatory requirement. Minimum Community Benefit Points (CBP) Required - 50.

Please refer to the tender documentation for further information.

(SC Ref:709748)

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

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

Glasgow Sheriff Court and Justice of the Peace Court

PO Box 23 1 Carlton Place

Glasgow

G2 9DA

Email

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

Country

United Kingdom

### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

Glasgow City Council (“the Council”) must, by notice in writing as soon as possible after the decision has been made, inform all tenderers and candidates concerned of its decision to award the contract, conclude the framework agreement or establish a dynamic purchasing system. The Council must allow a period of at least the relevant standstill period (where the notice is sent by facsimile or electronic means the period is 10 days ending at midnight at the end of the 10th day after that on which the last notice is sent, when sent by other means the period is 15 days) to elapse between the date of despatch of the notice referred to in Regulation 85(1) of the Public Contracts (Scotland) Regulations 2015 (“the Regulations”). The Council is obliged to comply with the Regulations and any eligible economic operator can bring an action in the Sheriff Court or the Court of Session where as a consequence of a breach by the Council, suffers or risks suffering loss or damage. The bringing of court proceedings during the standstill period means that the Council must not enter into the contract, conclude the framework agreement or establish the dynamic purchasing system unless the proceedings are determined, discontinued or disposed of; or the court, by interim order, brings to an end the prohibition. The bringing of court proceedings after the standstill period has elapsed and the remedies that are available to the courts are detailed in the Regulations. Economic Operators can write to the Council seeking further clarification on the notice, to which the Council must respond within 15 days. Economic Operators should be mindful to seek their own independent legal advice when they consider appropriate to do so.