625531-2024 - Competition

See the notice on TED website

United Kingdom – Insurance services – Insurance, Brokerage and Associated Risk Management Services (APUC)
OJ S 202/2024 16/10/2024
Contract or concession notice – standard regime - Change notice
Services

1. Buyer

1.1. Buyer

Official name: APUC Limited
Email: enquiries@apuc-scot.ac.uk
Legal type of the buyer: Body governed by public law
Activity of the contracting authority: Education

2. Procedure

2.1. Procedure

Title: Insurance, Brokerage and Associated Risk Management Services (APUC)
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
Procedure identifier: b63cc48f-c009-4a63-bb9b-10f8212433b6
Type of procedure: Open
The procedure is accelerated: no

2.1.1. Purpose

Main nature of the contract: Services
Main classification (cpv): 66510000 Insurance services
Additional classification (cpv): 66518100 Insurance brokerage services, 66517300 Risk management insurance services

2.1.2. Place of performance

Postal address: APUC Limited Unit 27, Stirling Business Centre Wellgreen
Town: Stirling
Postcode: FK8 2DZ
Country subdivision (NUTS): Perth & Kinross and Stirling (UKM77)
Country: United Kingdom

2.1.3. Value

Estimated value excluding VAT: 20 000 000,00 GBP

2.1.4. General information

Additional 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 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 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) ≥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/ 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).
Legal basis:
Directive 2014/24/EU

2.1.5. Terms of procurement

Terms of submission:

Maximum number of lots for which one tenderer can submit tenders: 3
Terms of contract:
Maximum number of lots for which contracts can be awarded to one tenderer: 3

5. Lot

5.1. Lot: LOT-0001
Title: Lot 1 - Insurance Services
Description: 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.
Internal identifier: PFB1043 AP - Lot 1

5.1.1. Purpose

Main nature of the contract: Services
Main classification (cpv): 66510000 Insurance services
Options:
Description of the options: 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.

5.1.2. Place of performance

Country: United Kingdom
Anywhere in the given country
Additional information: Scotland

5.1.3. Estimated duration

Start date: 01/01/2025
Duration end date: 31/12/2027

5.1.4. Renewal

Maximum renewals: 1

5.1.6. General information

This is a recurrent procurement
Description: Estimated timing for further notices to be published: 48 months
Reserved participation: Participation is not reserved.
The names and professional qualifications of the staff assigned to perform the contract must be given: Not required
Procurement Project fully or partially financed with EU Funds.
Information about European Union funds
EU funds programme:
Horizon Europe – the Framework Programme for Research and Innovation (2021/2027)
Further details of EU funds: and other EU grant funds as applicable
The procurement is covered by the Government Procurement Agreement (GPA): yes
This procurement is also suitable for small and medium-sized enterprises (SMEs)

5.1.10. Award criteria

Criterion:

Type: Quality
Description: 70% Technical

Criterion:
Type: Price
Description: 30% Price
Description of the method to be used if weighting cannot be expressed by criteria: Criteria below Quality criterion: Technical / Weighting: 70% Price criterion: Commercial / Weighting: 30%

5.1.11. Procurement documents

Languages in which the procurement documents are officially available: English
Deadline for requesting additional information: 14/10/2024 12:00:00 (UTC+1)
Address of the procurement documents: https://www.publictendersscotland.publiccontractsscotland.gov.uk

5.1.12. Terms of procurement

Terms of submission:
Electronic submission: Required
Address for submission: https://www.publictendersscotland.publiccontractsscotland.gov.uk
Languages in which tenders or requests to participate may be submitted: English
Electronic catalogue: Allowed
Variants: Not allowed
Tenderers may submit more than one tender: Not allowed
Deadline for receipt of tenders: 29/10/2024 17:00:00 (UTC)
Deadline until which the tender must remain valid: 6 Months
Information about public opening:
Opening date: 29/10/2024 17:00:00 (UTC)
Terms of contract:
The execution of the contract must be performed within the framework of sheltered employment programmes: No
A non-disclosure agreement is required: no
Electronic invoicing: Allowed
Electronic ordering will be used: yes
Electronic payment will be used: yes

5.1.15. Techniques

Framework agreement: Framework agreement, with reopening of competition
Maximum number of participants: 15
Information about the dynamic purchasing system: No dynamic purchase system

5.1.16. Further information, mediation and review

Review organisation: Stirling Sheriff Court and Justice of the Peace Court
Organisation providing more information on the review procedures: APUC Limited
TED eSender: Publications Office of the European Union

5.1. Lot: LOT-0002

Title: Lot 2 - Brokerage Services
Description: 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.
Internal identifier: PFB1043 AP - Lot 2

5.1.1. Purpose

Main nature of the contract: Services
Main classification (cpv): 66518100 Insurance brokerage services
Options:
Description of the options: 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.

5.1.2. Place of performance

Country: United Kingdom
Anywhere in the given country
Additional information: Scotland

5.1.3. Estimated duration

Start date: 01/01/2025
Duration end date: 31/12/2027

5.1.4. Renewal

Maximum renewals: 1

5.1.6. General information

This is a recurrent procurement
Description: Estimated timing for further notices to be published: 48 months
Reserved participation: Participation is not reserved.
The names and professional qualifications of the staff assigned to perform the contract must be given: Not required
Procurement Project fully or partially financed with EU Funds.
Information about European Union funds
EU funds programme:
Horizon Europe – the Framework Programme for Research and Innovation (2021/2027)
Further details of EU funds: and other EU grant funds as applicable
The procurement is covered by the Government Procurement Agreement (GPA): yes
This procurement is also suitable for small and medium-sized enterprises (SMEs)

5.1.10. Award criteria

Criterion:
Type: Quality
Description: 70% Technical

Criterion:
Type: Price
Description: 30% Price
Description of the method to be used if weighting cannot be expressed by criteria: Criteria below Quality criterion: Technical / Weighting: 70% Price criterion: Commercial / Weighting: 30%

5.1.11. Procurement documents

Languages in which the procurement documents are officially available: English
Deadline for requesting additional information: 14/10/2024 17:00:00 (UTC+1)
Address of the procurement documents: https://www.publictendersscotland.publiccontractsscotland.gov.uk

5.1.12. Terms of procurement

Terms of submission:
Electronic submission: Required
Address for submission: https://www.publictendersscotland.publiccontractsscotland.gov.uk
Languages in which tenders or requests to participate may be submitted: English
Electronic catalogue: Allowed
Variants: Not allowed
Tenderers may submit more than one tender: Not allowed
Deadline for receipt of tenders: 29/10/2024 12:00:00 (UTC)
Deadline until which the tender must remain valid: 6 Months
Information about public opening:
Opening date: 29/10/2024 17:00:00 (UTC)
Terms of contract:
The execution of the contract must be performed within the framework of sheltered employment programmes: No
A non-disclosure agreement is required: no
Electronic invoicing: Allowed
Electronic ordering will be used: yes
Electronic payment will be used: yes

5.1.15. Techniques

Framework agreement: Framework agreement, with reopening of competition
Maximum number of participants: 15
Information about the dynamic purchasing system: No dynamic purchase system

5.1.16. Further information, mediation and review

Review organisation: Stirling Sheriff Court and Justice of the Peace Court
Organisation providing more information on the review procedures: APUC Limited
TED eSender: Publications Office of the European Union

5.1. Lot: LOT-0003

Title: Lot 3 - Insurance Services
Description: 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.
Internal identifier: PFB1043 AP - Lot 3

5.1.1. Purpose

Main nature of the contract: Services
Main classification (cpv): 66517300 Risk management insurance services
Options:

Description of the options: 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.

5.1.2. Place of performance

Country: United Kingdom

Anywhere in the given country

Additional information: Scotland

5.1.3. Estimated duration

Start date: 01/01/2025

Duration end date: 31/12/2027

5.1.4. Renewal

Maximum renewals: 1

5.1.6. General information

This is a recurrent procurement

Description: Estimated timing for further notices to be published: 48 months

Reserved participation: Participation is not reserved.

The names and professional qualifications of the staff assigned to perform the contract must be given: Not required

Procurement Project fully or partially financed with EU Funds.

Information about European Union funds

EU funds programme:

Horizon Europe – the Framework Programme for Research and Innovation (2021/2027)

Further details of EU funds: and other EU grant funds as applicable

The procurement is covered by the Government Procurement Agreement (GPA): yes

This procurement is also suitable for small and medium-sized enterprises (SMEs)

5.1.10. Award criteria

Criterion:

Type: Quality

Description: 70% Technical

Criterion:

Type: Price

Description: 30% Price

Description of the method to be used if weighting cannot be expressed by criteria: Criteria below Quality criterion: Technical / Weighting: 70% Price criterion: Commercial / Weighting: 30%

5.1.11. Procurement documents

Languages in which the procurement documents are officially available: English

Deadline for requesting additional information: 14/10/2024 12:00:00 (UTC+1)

Address of the procurement documents: https://www.publictendersscotland.publiccontractsscotland.gov.uk

5.1.12. Terms of procurement

Terms of submission:

Electronic submission: Required

Address for submission: https://www.publictendersscotland.publiccontractsscotland.gov.uk
Languages in which tenders or requests to participate may be submitted: English
Electronic catalogue: Allowed
Variants: Not allowed
Tenderers may submit more than one tender: Not allowed
Deadline for receipt of tenders: 29/10/2024 17:00:00 (UTC)
Deadline until which the tender must remain valid: 6 Months
Information about public opening:
Opening date: 29/10/2024 17:00:00 (UTC)
Terms of contract:
The execution of the contract must be performed within the framework of sheltered employment programmes: No
A non-disclosure agreement is required: no
Electronic invoicing: Allowed
Electronic ordering will be used: yes
Electronic payment will be used: yes

5.1.15. Techniques

Framework agreement: Framework agreement, with reopening of competition
Maximum number of participants: 15
Information about the dynamic purchasing system: No dynamic purchase system

5.1.16. Further information, mediation and review

Review organisation: Stirling Sheriff Court and Justice of the Peace Court
Organisation providing more information on the review procedures: APUC Limited
TED eSender: Publications Office of the European Union

8. Organisations

8.1. ORG-0001

Official name: APUC Limited
Registration number: SC314764
Postal address: APUC Limited Unit 27, Stirling Business Centre Wellgreen
Town: Stirling
Postcode: FK8 1NH
Country subdivision (NUTS): Perth & Kinross and Stirling (UKM77)
Country: United Kingdom
Contact point: APUC Limited
Email: enquiries@apuc-scot.ac.uk
Telephone: 0131 442 8930
Internet address: https://apuc-scot.ac.uk/
Buyer profile: https://www.publiccontractsscotland.gov.uk/
Roles of this organisation:
Buyer
Organisation providing more information on the review procedures

8.1. ORG-0002

Official name: Stirling Sheriff Court and Justice of the Peace Court
Registration number: Stirling Sheriff Court and Justice of the Peace Court
Department: Review Body

Postal address: Stirling Sheriff Court House Viewfield Place
Town: Stirling
Postcode: FK8 1NH
Country subdivision (NUTS): Perth & Kinross and Stirling (UKM77)
Country: United Kingdom
Contact point: Stirling Sheriff Court House
Email: stirling@scotcourts.gov.uk
Telephone: 01786462191
Internet address: https://www.scotcourts.gov.uk/the-courts/courts-locations/stiling-sheriff-court-justice-of-the-peace-court
Roles of this organisation:
Review organisation

8.1. ORG-0000
Official name: Publications Office of the European Union
Registration number: PUBL
Town: Luxembourg
Postcode: 2417
Country subdivision (NUTS): Luxembourg (LU000)
Country: Luxembourg
Email: ted@publications.europa.eu
Telephone: +352 29291
Internet address: https://op.europa.eu
Roles of this organisation:
TED eSender

10. Change

Version of the previous notice to be changed: 551135-2024

Main reason for change: Buyer correction

11. Notice information

11.1. Notice information
Notice identifier/version: b2a22b64-f0e2-410d-82c6-cae99bc00fef - 01
Form type: Competition
Notice type: Contract or concession notice – standard regime
Notice subtype: 16
Notice dispatch date: 15/10/2024 13:00:31 (UTC)
Languages in which this notice is officially available: English

11.2. Publication information
Notice publication number: 625531-2024
OJ S issue number: 202/2024
Publication date: 16/10/2024