

**United Kingdom-Portsmouth: Insurance services**  
**OJ S 14/2017 20/01/2017**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

---

**I.1. Name and addresses**

Official name: First Wessex  
Postal address: Peninsular House  
Town: Portsmouth  
NUTS code: UKJ South East (England)  
Postal code: PO2 8HB  
Country: United Kingdom  
Contact person: Mr Ian Lichfield  
E-mail: [ian.lichfield@firstwessex.org](mailto:ian.lichfield@firstwessex.org)  
Telephone: +44 2392896819

**Internet address(es):**

Main address: <http://www.firstwessex.org>  
Address of the buyer profile: <http://www.firstwessex.org>

**I.1. Name and addresses**

Official name: Sentinel Housing Association  
Town: Basingstoke  
NUTS code: UKJ South East (England)  
Country: United Kingdom  
E-mail: [ian.lichfield@firstwessex.org](mailto:ian.lichfield@firstwessex.org)  
**Internet address(es):**  
Main address: <https://www.sentinelha.org.uk/>

**I.2. Information about joint procurement**

The contract involves joint procurement

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://procontract.due-north.com/Advert/Index?advertId=1811a93a-d0dc-e611-80da-005056b64545>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://procontract.due-north.com/Advert/Index?advertId=1811a93a-d0dc-e611-80da-005056b64545>

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

Body governed by public law

**I.5. Main activity**

Housing and community amenities

## Section II: Object

---

### II.1. Scope of the procurement

#### II.1.1. Title

First Wessex and Sentinel Housing Association: Insurance Services.  
Reference number: DN233833

#### II.1.2. Main CPV code

66510000 Insurance services

#### II.1.3. Type of contract

Services

#### II.1.4. Short description

First Wessex and Sentinel are looking to procurement for the contract of Insurance services. Two housing associations, First Wessex and Sentinel Housing Association, are planning on joining together to create a new Hampshire-based housing association. We will create a new organisation called Vivid with 30 000 homes and a strong commitment to addressing housing needs. From herein within this contract notice and tender documents, the proposed organisation will be referred to and known as 'Vivid'.

#### II.1.5. Estimated total value

#### II.1.6. Information about lots

This contract is divided into lots: yes

Tenders may be submitted for all lots

The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

We reserve the right to consider inviting to tender any providers that have selected and responded for Lot 4 (all lots) and can still be considered for other Lots separately.

### II.2. Description

#### II.2.1. Title

Property Stock, Public / Property Owners Liability, Employers Liability, Professional Indemnity and Engineering insurance & Inspection;  
Lot No: 1

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

66515200 Property insurance services

#### II.2.3. Place of performance

NUTS code: UKJ South East (England)

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

Insurance services will involve insurance broking, insurance underwriting or a combination of both. The term is intended to include the arrangement, placing and administration of insurance policies, as well as ancillary claims settlement and administration, risk management services and any other insurance related services. It is the intention of Vivid to retain insurance service providers for a period of three years, subject to satisfactory annual reviews of service and performance and no breach of the LTA/LTU, with an option to extend for up to 2 further years. The term will commence on 1.7.2017.

The process will be conducted in two stages under the Competitive Procedure with Negotiation of PCR 2015. This lot includes requirements for insurance services for: Property Stock.  
Property Owners' and Public Liability.  
Employers' Liability.  
Professional Indemnity.  
Engineering.

**II.2.5. Award criteria**

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

**II.2.6. Estimated value**

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

Duration in months: 36

This contract is subject to renewal: no

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

Maximum number: 6

**II.2.10. Information about variants**

Variants will be accepted: yes

**II.2.11. Information about options**

Options: yes

Description of options:

First Wessex and Sentinel Housing are looking to enter into a Long Term Agreement or similar undertaking for 3 years with an option to extend the contract for up to a further 2 years, all subject to satisfactory service, cost and performance and no breach of LTA / LTU. This is an option — not a binding commitment.

**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**

**II.2. Description**

**II.2.1. Title**

Lot 2: Crime, Cyber Liability, Group Personal Accident, Office Risks and Business Interruption, Computers and Employment Practices Liability;  
Lot No: 2

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

66512100 Accident insurance services

**II.2.3. Place of performance**

NUTS code: UKJ South East (England)

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

Insurance services will involve insurance broking, insurance underwriting or a combination of both. The term is intended to include the arrangement, placing and administration of insurance policies, as well as ancillary claims settlement and administration, risk management services

and any other insurance related services. It is the intention of Vivid to retain insurance service providers for a period of three years, subject to satisfactory annual reviews of service and performance and no breach of the LTA/LTU, with an option to extend for up to 2 further years. The term will commence on 1.7.2017.

The process will be conducted in two stages under the Competitive Procedure with Negotiation of PCR 2015. This lot includes requirements for insurance services for:  
Crime Insurance.

Cyber Liability.

Group Personal Accident.

Office Risks and Business Interruption.

Computers.

Employment Practices Liability.

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

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

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

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

Duration in months: 36

This contract is subject to renewal: no

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

Maximum number: 6

#### **II.2.10. Information about variants**

Variants will be accepted: yes

#### **II.2.11. Information about options**

Options: yes

Description of options:

First Wessex and Sentinel Housing are looking to enter into a Long Term Agreement or similar undertaking for 3 years with an option to extend the contract for up to a further 2 years, all subject to satisfactory service, cost and performance and no breach of LTA / LTU. This is an option — not a binding commitment.

#### **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**

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

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

Motor Fleet

Lot No: 3

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

66514110 Motor vehicle insurance services

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

NUTS code: UKJ South East (England)

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

Insurance services will involve insurance broking, insurance underwriting or a combination of both. The term is intended to include the arrangement, placing and administration of insurance policies, as well as ancillary claims settlement and administration, risk management services and any other insurance related services. It is the intention of Vivid to retain insurance service providers for a period of three years, subject to satisfactory annual reviews of service and performance and no breach of the LTA/LTU, with an option to extend for up to 2 further years. The term will commence on 1.7.2017.

The process will be conducted in two stages under the Competitive Procedure with Negotiation of PCR 2015. This lot includes requirements for insurance services for: Motor Fleet.

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

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

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

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

Duration in months: 36

This contract is subject to renewal: no

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

Maximum number: 6

#### **II.2.10. Information about variants**

Variants will be accepted: yes

#### **II.2.11. Information about options**

Options: yes

Description of options:

First Wessex and Sentinel Housing are looking to enter into a Long Term Agreement or similar undertaking for 3 years with an option to extend the contract for up to a further 2 years, all subject to satisfactory service, cost and performance and no breach of LTA / LTU. This is an option — not a binding commitment.

#### **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**

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

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

All Lots- all insurances stated in Lots 1 to 3  
Lot No: 4

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

66500000 Insurance and pension services

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

NUTS code: UKJ South East (England)

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

Insurance services will involve insurance broking, insurance underwriting or a combination of both. The term is intended to include the arrangement, placing and administration of insurance policies, as well as ancillary claims settlement and administration, risk management services and any other insurance related services. It is the intention of Vivid to retain insurance service providers for a period of three years, subject to satisfactory annual reviews of service and performance and no breach of the LTA/LTU, with an option to extend for up to 2 further years. The term will commence on 1.7.2017.

The process will be conducted in two stages under the Competitive Procedure with Negotiation of PCR 2015. This lot includes requirements for insurance services for covered in Lots 1 to 3 inclusive.

**II.2.5. Award criteria**

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

**II.2.6. Estimated value**

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

Duration in months: 36

This contract is subject to renewal: no

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

Maximum number: 6

**II.2.10. Information about variants**

Variants will be accepted: yes

**II.2.11. Information about options**

Options: yes

Description of options:

First Wessex and Sentinel Housing are looking to enter into a Long Term Agreement or similar undertaking for 3 years with an option to extend the contract for up to a further 2 years, all subject to satisfactory service, cost and performance and no breach of LTA / LTU. This is an option — not a binding commitment.

**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**

**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:

Potential service providers may be requested to provide a summary and overview of services provided to the social housing sector over the past 3 years, and details of up to 5 clients receiving similar services. Potential service providers may be asked to produce a certificate issued by the appropriate insurance regulatory authority indicating the types of insurance the insurer is authorised to provide in the UK.

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

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

## **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:

This service will be regulated by the provisions of the Financial Services and Markets Act 2000 and any other modifications thereof. Providers of insurance services will be required to be authorised by the Financial Conduct Authority.

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

As stated in the tender documents.

### **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

## **Section IV: Procedure**

---

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

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

Competitive procedure with negotiation

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

#### **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: no

### **IV.2. Administrative information**

#### **IV.2.2. Time limit for receipt of tenders or requests to participate**

Date: 09/02/2017 Local time: 16:00

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

#### **IV.2.4. Languages in which tenders or requests to participate may be submitted**

English

## **Section VI: Complementary information**

---

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

This is a recurrent procurement: yes

Estimated timing for further notices to be published:  
2020.

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

Insurance of social landlords is a highly specialist field, and Vivid will require respondents to this notice to be able to demonstrate clearly a strong ability to provide insurance in the RP sector where relevant (as clarified within the contract documentation). This will include providing details of the your main insurance providers for the principal risks, details of your insurance policy wordings and evidence of detailed knowledge and experience on the part of all account servicing, claims handling and risk management staff. The proposal will be expected to demonstrate in practical terms the capability of tenderers to manage effectively the insurance arrangements for Vivid, as well as providing competitive insurance terms from experienced RP insurers where relevant. Vivid requires that all insurers proposed for its insurance arrangements shall be at least A rated by Standard and Poors or an equivalent rating agency.

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

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

Official name: HCA

Town: Guildford

Country: United Kingdom

### **VI.5. Date of dispatch of this notice**

18/01/2017