

United Kingdom-Liverpool: Insurance services

OJ S 20/2016 29/01/2016

Contract notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: Liverpool Mutual Homes

Postal address: LMH @ The Observatory

Town: Liverpool

Postal code: L1 6RA

Country: United Kingdom

For the attention of: Ms Susan Duncan-Wood

E-mail: procurementteam@liverpoolmh.co.uk

Telephone: +44 3001232300

Internet address(es):

General address of the contracting authority: www.liverpoolmutualhomes.org

Address of the buyer profile: www.the-chest.org.uk

Electronic access to information: www.the-chest.org.uk

Electronic submission of tenders and requests to participate: www.the-chest.org.uk

Additional information can be obtained from:

Official name: Liverpool Mutual Homes

Postal address: LMH @ The Observatory

Town: Liverpool

Postal code: L1 6RA

Country: United Kingdom

For the attention of: Ms Susan Duncan-Wood

E-mail: procurementteam@liverpoolmh.co.uk

Telephone: +44 3001232300

Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from:

Official name: Liverpool Mutual Homes

Postal address: LMH @ The Observatory

Town: Liverpool

Postal code: L1 6RA

Country: United Kingdom

For the attention of: Ms Susan Duncan-Wood

E-mail: procurementteam@liverpoolmh.co.uk

Telephone: +44 3001232300

Tenders or requests to participate must be submitted: Official name: Liverpool Mutual Homes

Postal address: LMH @ The Observatory

Town: Liverpool

Postal code: L1 6RA

Country: United Kingdom

For the attention of: Ms Susan Duncan-Wood
E-mail: procurementteam@liverpoolmh.co.uk
Telephone: +44 3001232300

I.2. Type of the contracting authority

Body governed by public law

I.3. Main activity

Housing and community amenities

I.4. Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: no

Section II: Object of the contract

II.1. Description

II.1.1. Title attributed to the contract by the contracting authority

Insurance and Related Services.

II.1.2. Type of contract and place of performance or delivery

Services

Service category No 6: Financial services a) Insurances services b) Banking and investment services

NUTS code UKD5 Merseyside

II.1.3. Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

II.1.4. Information about framework agreement

Framework agreement with several operators

Maximum number Envisaged maximum number of participants to the framework agreement
: 3

Duration of the framework agreement

Duration in months: 42

Estimated total value of purchases for the entire duration of the framework agreement

Estimated value excluding VAT:

Range: between 3 500 000 and 8 000 000 GBP

Frequency and value of the contracts to be awarded: The term of the Contract will commence with cover inception on 31.3.2016, although preparatory work to set in place the programme may be required before this date. The duration of the new contract is expected to be for a period of 2 annual policy periods from 31.3.2016 (we also require Bidders to quote for a single 1st policy period of 16 months from 31.3.2016 to 31.7.2017). A further extension of this contract of up to 2 years may be considered by the contracting Authority strictly subject to satisfactory performance and annual review.

II.1.5. Short description of the contract or purchase(s)

Liverpool Mutual Homes (LMH) are looking for a Provider(s) to be appointed to provide Insurance and related Services, plus an Engineering Inspection contract (Lifts).

OJEU Open procedure to submit a full Tender for the provision of Insurance and related Services to LMH divided into 3 Lots.

Services under Lots 1 and 2 may include insurance broking, insurance underwriting or a combination of both. For Lots 1 and 2, we require a suitable provider of Insurance Broking and

/or Insurance Underwriting services to design, place and manage our general insurance programme and to advise us in the future.

Lot 3 requires an Engineering Inspection service.

II.1.6. CPV code(s)

66510000 Insurance services

II.1.7. Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: no

II.1.8. Lots

This contract is divided into lots: yes

Tenders may be submitted for all lots

II.1.9. Information about variants

Variants will be accepted: no

II.2. Scope of the procurement

II.2.1. Total quantity or scope

Liverpool Mutual Homes (LMH) are looking for a Provider(s) to be appointed to provide Insurance and related Services, plus an Engineering Inspection contract.

LMH require Insurance and related services as described for it's operations that include circa 15 000 homes and 400 FTE and a Fleet of circa 200 vehicles. Current annual spend on insurance is in the region of 1 000 000 GBP pa.

OJEU Open procedure to submit a full Tender for the provision of Insurance and related Services to LMH divided into 3 Lots.

Services under Lots 1 and 2 may include insurance broking, insurance underwriting or a combination of both. For Lots 1 and 2, we require a suitable provider of Insurance Broking and /or Insurance Underwriting services to design, place and manage our general insurance programme and to advise us in the future.

Lot 3 requires an Engineering Inspection service.

Estimated value excluding VAT:

Range: between 3 750 000 and 7 500 000 GBP

II.2.2. Information about options

Options: yes

Description of options: The Contracting Authority shall be entitled at it's absolute discretion to extend the duration of the contract after the initial 16 month term, by up to two (2) periods of one (1) years making a total of 40 months.

Provisional timetable for recourse to these options:

in months: 16 (from the award of the contract)

II.2.3. Information about renewals

This contract is subject to renewal: no

II.3. Duration of the contract or time limit for completion

Duration in months: 40 (from the award of the contract)

Information about lots

Lot No: 1

Lot title: General

1) Short description

Lot 1 will include some or all of the following classes of insurance and related services:

Property and related Business Interruption risks (possibly including Property Owners Liability) plus associated Terrorism cover. Combined Liabilities, Insurance for Employers, Public, Products Liability risks (possibly including Property Owners Liability), plus Libel and Slander risks. Insurance for Commercial Combined / Business / Office risks plus associated Terrorism cover. Engineering Insurance, Insurance and related services for risks associated with lifting, pressure plant and the like, as required by the Contracting Authority. Fidelity / Crime Other non-life insurances commensurate with the activities of a Social Housing Provider.

2) CPV code(s)

66510000 Insurance services

3) Quantity or scope

LMH require Insurance and related services as described for it's operations that include circa 15 000 homes and 400 FTE.

Property and related Business Interruption risks (possibly including Property Owners Liability) plus associated Terrorism cover.

Combined Liabilities, Insurance for Employers, Public, Products Liability risks (possibly including Property Owners Liability), plus Libel and Slander risks.

Insurance for Commercial Combined / Business / Office risks plus associated Terrorism cover.

Engineering Insurance, Insurance and related services for risks associated with lifting, pressure plant and the like, as required by the Contracting Authority.

Fidelity / Crime.

Other non-life insurances commensurate with the activities of a Social Housing Provider.

Estimated value excluding VAT:

Range: between 2 500 000 and 4 500 000 GBP

4) Indication about different time frame or duration

5) Additional information about lots

For Lots 1 and 2, as a minimum we require you to demonstrate:

- You are an insurance broker registered with and regulated by the Financial Conduct Authority or an Insurer regulated by the Prudential Regulation Authority, the UK Financial Conduct Authority or equivalent in another member state of the European Economic Area.
- The financial ability to deliver the programme, including the use of insurers with a Standard & Poor's (or equivalent) rating of A- or above.
- Relevant experience in the management of multi-class insurance programmes for social housing organisations and/or other large property owners.
- The ability to provide Liverpool Mutual Homes with a choice of insurers and/or options.
- A skilled and competent service team, being Client Relationship Management, Insurance Claims management, Insurance Broking / underwriting and risk managers.
- Your commitment to delivering quality service to Liverpool Mutual Homes and our clients, including that provided to us by any third party contractor employed by you or by the Insurers you propose.
- Your ability to demonstrate client satisfaction on other similar contracts.
- CII chartered firm status and/or commitment to similar professional organisations.
- A robust approach to equality and diversity issues.

Lot No: 2

Lot title: Motor Fleet

1) Short description

Motor Fleet including Motor Legal Expenses. Insurance for risks associated with the Company's fleet of Commercial and Private vehicles.

2) CPV code(s)

66510000 Insurance services

3) Quantity or scope

Leased fleet circa 150 and approx. 40 short term hires LCV in the main.

Estimated value excluding VAT:

Range: between 1 000 000 and 2 500 000 GBP

4) Indication about different time frame or duration

Duration in months: 0 (from the award of the contract)

5) Additional information about lots

For Lots 1 and 2, as a minimum we require you to demonstrate:

- You are an insurance broker registered with and regulated by the Financial Conduct Authority or an Insurer regulated by the Prudential Regulation Authority, the UK Financial Conduct Authority, or equivalent in another member state of the European Economic Area.
- The financial ability to deliver the programme, including the use of insurers with a Standard & Poor's (or equivalent) rating of A- or above.
- Relevant experience in the management of multi-class insurance programmes for social housing organisations and/or other large property owners.
- The ability to provide Liverpool Mutual Homes with a choice of insurers and/or options.
- A skilled and competent service team, being Client Relationship Management, Insurance Claims management, Insurance Broking / underwriting and risk managers.
- Your commitment to delivering quality service to Liverpool Mutual Homes and our clients, including that provided to us by any third party contractor employed by you or by the Insurers you propose.
- Your ability to demonstrate client satisfaction on other similar contracts.
- CII chartered firm status and/or commitment to similar professional organisations.
- A robust approach to equality and diversity issues.

Lot No: 3

Lot title: Engineering Inspection

1) Short description

An Inspection service and relevant supporting activity associated with all lifting, pressure plant and the like, as required by the Contracting Authority.

2) CPV code(s)

71300000 Engineering services

3) Quantity or scope

Approx. 25 passenger lifts mostly in sheltered housing schemes.

Estimated value excluding VAT:

Range: between 20 000 and 150 000 GBP

4) Indication about different time frame or duration

5) Additional information about lots

Section III: Legal, economic, financial and technical information

III.1. Conditions related to the contract

III.1.1.

Deposits and guarantees required

Any deposits or guarantees required will be set out in the contract documents.

III.1.2. Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them

Any conditions or arrangements will be set out in the contract documents.

III.1.3. Legal form to be taken by the group of economic operators to whom the contract is to be awarded

Joint and Several.

III.1.4. Contract performance conditions

The performance of the contract is subject to particular conditions: yes

Description of particular conditions: For Lots 1 and 2, as a minimum we require you to demonstrate: — You are an insurance broker registered with and regulated by the Financial Conduct Authority or an Insurer regulated by the Prudential Regulation Authority, the UK Financial Conduct Authority or equivalent in another member state of the European Economic Area — The financial ability to deliver the programme, including the use of insurers with a Standard & Poor's (or equivalent) rating of A- or above — Relevant experience in the management of multi-class insurance programmes for social housing organisations and/or other large property owners — The ability to provide Liverpool Mutual Homes with a choice of insurers and/or options — A skilled and competent service team, being Client Relationship Management, Insurance Claims management, Insurance Broking / underwriting and risk managers — Your commitment to delivering quality service to Liverpool Mutual Homes and our clients, including that provided to us by any third party contractor employed by you or by the Insurers you propose — Your ability to demonstrate client satisfaction on other similar contracts — CII chartered firm status and/or commitment to similar professional organisations — A robust approach to equality and diversity issues.

III.2. Conditions for participation

III.2.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions: Any supplier may be disqualified who:

- (a) Is bankrupt or is being wound up, where his affairs are being administered by the Court, where he has entered into an arrangement with creditors, where he has suspended business activities or is in any analogous situation arising from a similar procedure under national laws and regulations;
- (b) Is the subject of proceedings for a declaration of bankruptcy, for an order compulsory winding up the administration by the Court or of an arrangement with creditors or of any other similar proceedings under national laws and regulations;
- (c) Has been convicted by a judgement which has the force of res judicata in accordance with the legal provisions of the country of any offence concerning his professional conduct;
- (d) Has been guilty of grave professional misconduct proven by any means which the contract authorities can demonstrate;
- (e) Has not fulfilled obligations relating to the payment of social security contributions in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority;
- (f) Has not fulfilled obligations relating to the payment of taxes in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority;
- (g) Is guilty of serious misrepresentation in supplying the information required under this

Section or has not supplied such information;

(h) Has been the subject of a conviction for participation in a criminal organization, as defined in Article 2(1) of Council Joint Action 98/733/JHA;

(i) Has been the subject of a conviction for corruption, as defined in Article 3 of the Council Act of 26.5.1972 and Article 3(1) of Council Joint Action 98/742/JHA3 respectively;

(j) Has been the subject of a conviction for fraud within the meaning of Article 1 of the Convention relating to the protection of the financial interests of the European Communities;

(k) Has been the subject of a conviction for money laundering, as defined in Article 1 of Council Directive 91/308/EEC of 10.6.1991 on prevention of the use of the financial system for the purpose of money laundering.

As set out in the contract documents: III.2.2)

Economic and financial ability:

As set out in the.

III.2.2. Economic and financial ability

List and brief description of conditions: Minimum level(s) of standards possibly required: As set out in the contract documents.

Minimum level(s) of standards possibly required: For Lots 1 and 2, as a minimum we require you to demonstrate: — You are an insurance broker registered with and regulated by the Financial Conduct Authority or an Insurer regulated by the Prudential Regulation Authority, the UK Financial Conduct Authority, or equivalent in another member state of the European Economic Area — The financial ability to deliver the programme, including the use of insurers with a Standard & Poor's (or equivalent) rating of A- or above — Relevant experience in the management of multi-class insurance programmes for social housing organisations and/or other large property owners — The ability to provide Liverpool Mutual Homes with a choice of insurers and/or options — A skilled and competent service team, being Client Relationship Management, Insurance Claims management, Insurance Broking / underwriting and risk managers — Your commitment to delivering quality service to Liverpool Mutual Homes and our clients, including that provided to us by any third party contractor employed by you or by the Insurers you propose — Your ability to demonstrate client satisfaction on other similar contracts — CII chartered firm status and/or commitment to similar professional organisations — A robust approach to equality and diversity issues.

III.2.3. Technical and professional ability

List and brief description of conditions:

As set out in the contract documents.

Minimum level(s) of standards possibly required:

As set out in the contract documents.

III.2.4. Information about reserved contracts

III.3. Conditions specific to services contracts

III.3.1. Information about a particular profession

Execution of the service is reserved to a particular profession: no

III.3.2. 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: no

Section IV: Procedure

IV.1. Type of procedure

IV.1.1. Type of procedure

Open

IV.1.2. Information about the limits on the number of candidates to be invited

IV.1.3. Information about reduction of the number of solutions or tenders during negotiation or dialogue

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated no

IV.2. Award criteria

IV.2.1. Award criteria

The most economically advantageous tender in terms of Price is not the only award criterion and all criteria are stated only in the procurement documents

IV.2.2. Information about electronic auction

An electronic auction will be used: no

IV.3. Administrative information

IV.3.1. File reference number attributed by the contracting authority

IV.3.2. Previous publication concerning this procedure

IV.3.3. Conditions for obtaining specifications and additional documents or descriptive document

Time limit for receipt of requests for documents or for accessing documents: 24.2.2016 - 15:00
Payable documents: no

IV.3.4. Time limit for receipt of tenders or requests to participate

3.3.2016 - 15:30

IV.3.5. Estimated date of dispatch of invitations to tender or to participate to selected candidates

IV.3.6. Languages in which tenders or requests to participate may be submitted

English.

IV.3.7. Minimum time frame during which the tenderer must maintain the tender

until: 30.4.2016

IV.3.8. Conditions for opening of tenders

Date: 3.3.2016 - 16:30

Persons authorised to be present at the opening of tenders: no

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: no

VI.2. Information about European Union funds

The procurement is related to a project and/or programme financed by European Union funds:
no

VI.3. Additional information

The Contracting Authority reserves the right to cancel the procurement and not to proceed with the award of any contract at any stage of the procurement process and/or to award only part or parts of any contract. Save for any mandatory periods, the time-scales indicated in this notice are approximate and the Contracting Authority reserved the right to amend the same. The Contracting Authority intends to use an eTendering system in this procurement exercise. Suppliers can, express interest in this procurement, express their interest in working with the LMH Group and be informed of the latest opportunities by registering for free on the Due North Chest Procurement Portal: <http://www.the-chest.org.uk> Responses should be fully completed and submitted online using Due North no later than the date and time quoted in V.3.4)

VI.4. Procedures for review

VI.4.1. Review body

Official name: High Court of England and Wales
Postal address: Royal Courts of Justice, Strand
Town: London
Postal code: WC2A 2LL
Country: United Kingdom
Telephone: +44 2079476000

Body responsible for mediation procedures

Official name: High Court of England and Wales
Postal address: Royal Courts of Justice, Strand
Town: London
Postal code: WC2A 2LL
Country: United Kingdom
Telephone: +44 2079476000

VI.4.2. Review procedure

VI.4.3. Service from which information about the review procedure may be obtained

Official name: Crown Commercial Services
Postal address: 1 Horse Guard's Road
Town: London
Postal code: 1A 2HQ
Country: United Kingdom
Telephone: +44 8450004999

VI.5. Date of dispatch of this notice

27.1.2016