

**UK-St Helens: Insurance services**  
**OJ S 44/2013 02/03/2013**  
**Contract notice**  
**Services**

**Directive 2004/18/EC**

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Helena Partnerships Limited and / or Helena Commercial Services Ltd

Postal address: Helena Central, 4 Corporation Street

Town: St Helens

Postal code: WA9 1LD

Country: United Kingdom

For the attention of: Greg Parkinson

E-mail: [greg.parkinson@helenapartnerships.co.uk](mailto:greg.parkinson@helenapartnerships.co.uk)

Telephone: +44 1744675550

Fax: +44 174426228

**Additional information can be obtained from:**

Official name: Aon Ltd

Postal address: 40 Spring Gardens

Town: Manchester

Postal code: M2 1EN

Country: United Kingdom

For the attention of: Vicki Matthews

E-mail: [vicki.matthews@aon.co.uk](mailto:vicki.matthews@aon.co.uk)

Telephone: +44 1616872334

Internet address: <http://www.aon.com/>

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

Official name: Aon Ltd

Postal address: 40 Spring Gardens

Town: Manchester

Postal code: M2 1EN

Country: United Kingdom

For the attention of: Vicki Matthews

E-mail: [vicki.matthews@aon.co.uk](mailto:vicki.matthews@aon.co.uk)

Telephone: +44 1616872334

Internet address: <http://www.aon.com/>

**Tenders or requests to participate must be submitted:** the abovementioned address

**I.2. Type of the contracting authority**

Other: Housing Association

**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

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### II.1. Description

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

Helena Partnerships &/or Helena Commercial Services Limited - 2013 Contract Notice for General Insurance services excluding broking.

#### 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

Main site or place of performance: St Helens.

NUTS code UKD5 Merseyside

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

The notice involves a public contract

#### II.1.4. Information about framework agreement

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

Insurance services excluding broking as required by Helena Partnerships &/or Helena Commercial Services Limited

#### II.1.6. CPV code(s)

66510000 Insurance services, 66515200 Property insurance services, 66516100 Motor vehicle liability insurance services, 66516000 Liability insurance services, 66514110 Motor vehicle insurance services, 66513100 Legal expenses insurance services, 66513200 Contractor's all-risk insurance services, 66515411 Pecuniary loss insurance services, 66512000 Accident and health insurance services, 66516400 General liability insurance services, 66516500 Professional liability insurance services, 66515000 Damage or loss insurance services, 66515100 Fire 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: yes

### II.2. Scope of the procurement

#### II.2.1. Total quantity or scope

Tenders for insurance risks will be invited on the basis of a three year Long Term Agreement with the option to extend for a further two years. Options for longer term contracts will be considered provided sufficient information is provided by tenderers for the total cost of each option to be assessed. Insurers will be permitted to tender for all or some of the risk classes.

#### II.2.2. Information about options

Options: yes

Description of options: See II.2.1 above.

### **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: 12 (from the award of the contract)

Information about lots

Lot No: 1

Lot title: Property Damage / Business Interruption / Money / All Risks

#### **1) Short description**

Property Damage / Business Interruption / Money & All Risks cover for housing stock, leasehold properties, sales shops and office properties.

#### **2) CPV code(s)**

66515200 Property insurance services, 66515100 Fire insurance services, 66515000 Damage or loss insurance services

#### **3) Quantity or scope**

#### **4) Indication about different time frame or duration**

#### **5) Additional information about lots**

Lot No: 2

Lot title: Combined Liability

#### **1) Short description**

Employers' Liability and Public Liability.

#### **2) CPV code(s)**

66516000 Liability insurance services, 66516400 General liability insurance services

#### **3) Quantity or scope**

#### **4) Indication about different time frame or duration**

#### **5) Additional information about lots**

Lot No: 3

Lot title: Motor Fleet

#### **1) Short description**

Motor Fleet.

#### **2) CPV code(s)**

66514110 Motor vehicle insurance services, 66516100 Motor vehicle liability insurance services

#### **3) Quantity or scope**

#### **4) Indication about different time frame or duration**

#### **5) Additional information about lots**

Lot No: 4

Lot title: Fidelity Guarantee / Crime

#### **1) Short description**

Fidelity Guarantee / Crime.

- 2) CPV code(s)**  
66515411 Pecuniary loss insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 5

Lot title: Legal Expenses

- 1) Short description**  
Legal Expenses.
- 2) CPV code(s)**  
66513100 Legal expenses insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 6

Lot title: Contractors All Risks

- 1) Short description**  
Contract Works.
- 2) CPV code(s)**  
66513200 Contractor's all-risk insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 7

Lot title: Personal Accident

- 1) Short description**  
Personal Accident.
- 2) CPV code(s)**  
66512000 Accident and health insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 8

Lot title: Professional Indemnity

- 1) Short description**  
Professional Indemnity.
- 2) CPV code(s)**

66516500 Professional liability insurance services, 66516400 General liability insurance services, 66516000 Liability insurance services

- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 9

Lot title: Computers

- 1) Short description**  
Computers.
- 2) CPV code(s)**  
66515200 Property insurance services, 66515100 Fire insurance services, 66515000 Damage or loss insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 10

Lot title: Statutory Inspection and Engineering Insurance

- 1) Short description**  
Statutory Inspection and Engineering Insurance.
- 2) CPV code(s)**  
66519200 Engineering insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

Lot No: 11

Lot title: Terrorism

- 1) Short description**  
Terrorism for all properties and business interruption, computers and contract works.
- 2) CPV code(s)**  
66515200 Property insurance services, 66515100 Fire insurance services, 66515000 Damage or loss insurance services
- 3) Quantity or scope**
- 4) Indication about different time frame or duration**
- 5) Additional information about lots**

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

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#### **III.1. Conditions related to the contract**

### **III.1.1. Deposits and guarantees required**

Not applicable.

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

The awarding Trust will pay insurance premiums annually.

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

Not applicable.

### **III.1.4. Contract performance conditions**

The performance of the contract is subject to particular conditions: no

## **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: This tender is open to insurance companies who must be licensed to transact insurance business in the categories listed in II.1.6 either in the UK or the EC Member State of domicile.

### **III.2.2. Economic and financial ability**

List and brief description of conditions: Copy of last three years Annual Report and Accounts  
Overview of services provided to the Public Sector over the last three years  
Standard & Poor's, A M Best, Moody & Fitch (or equivalent rating)

### **III.2.3. Technical and professional ability**

List and brief description of conditions:

Details of names and qualifications of employees who would be responsible for delivery of services

List of other Housing Sector bodies insured and the risk classes involved

### **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: yes

Reference to the relevant law, regulation or administrative provision: This tender is open to insurance companies who are licensed to provide the insurance cover required either in the UK or in the EC Member State of domicile. Insurers must be authorised by the UK Financial Services Authority or equivalent.

### **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**

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### **IV.1. Type of procedure**

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

Negotiated

Some candidates have already been selected (if appropriate under certain types of negotiated procedures) yes

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

Envisaged minimum number 3: and Maximum number 20

Objective criteria for choosing the limited number of candidates: Insurance companies will be shortlisted using the criteria set out under III.2.1 and III.2.III above.

**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 Criteria below

1. Price. Weighting 50
2. Scope of Policy cover. Weighting 30
3. Claims Handling Service. Weighting 15
4. Added Value. Weighting 5

**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**

no

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

Payable documents: no

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

28.3.2013

**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**

**IV.3.8. Conditions for opening of tenders**

**Section VI: Complementary information**

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**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**

ACE Europe, Allianz, Amlin UK (Summit), Axa, Beazley, Brit, Chartis UK Insurance Ltd, Chubb, CNA, DAS, Ecclesiastical, , Generali Global, Groupama, Hiscox, HSB, JJS, Legal & General, Liberty, Lloyds of London, Markel, Maven Underwriters, Mitsui, QBE, Risk Management Partners, Royal & Sun Alliance, Swiss Re, Tokio Marine, Travelers, W R Berkley, XL, Zurich Municipal.

**VI.4. Procedures for review**

**VI.4.1. Review body**

**VI.4.2. Review procedure**

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

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

27.2.2013