

United Kingdom-St Helens: Insurance services
OJ S 55/2014 19/03/2014
Contract notice
Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: Helena Partnerships Ltd
Postal address: 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
Telephone: +44 1744675550

Internet address(es):

General address of the contracting authority: <http://www.helenapartnerships.co.uk>

Additional information can be obtained from:

the abovementioned address

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

the abovementioned address

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

I.2. Type of the contracting authority

Other: Registered Social Landlord

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

HHC231 Brokerage and Insurance Services Contract 2014.

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: Primarily in St Helens but also other locations as required to protect the assets earnings and liabilities of the awarding authority.

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 including broking (other than for direct markets) for property, business interruption, liability, motor vehicle, engineering, personal accident, fidelity guarantee, professional indemnity, construction related and other insurances and insurance services as required by Helena Partnerships Ltd.

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: no

II.1.9. Information about variants

Variants will be accepted: yes

II.2. Scope of the procurement

II.2.1. Total quantity or scope

Non-life insurance and related services.

II.2.2. Information about options

Options: yes

Description of options: Helena Partnerships Ltd is looking to enter into a Long Term Agreement or similar undertaking for 3 years with an option to extend the contract for a further 2 years, all subject to satisfactory service, cost and performance and no breach of LTA / LTU.

II.2.3. Information about renewals

This contract is subject to renewal: no

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

Section III: Legal, economic, financial and technical information

III.1. Conditions related to the contract

III.1.1. Deposits and guarantees required

As stated in tender documents.

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

As stated in tender 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 liability to be assumed by all group bidders before acceptance.

III.1.4. Contract performance conditions

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

Description of particular conditions: As stated in tender documents.

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: Potential suppliers may be requested to provide a summary and overview of services provided to the social housing sector over the past 5 years, and details of up to 5 clients receiving similar services. Potential suppliers 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 and must comply with UK Department of Trade and Industry regulations.

III.2.2. Economic and financial ability

List and brief description of conditions: As stated in tender documents.

Minimum level(s) of standards possibly required: As stated in tender documents.

III.2.3. Technical and professional ability

List and brief description of conditions:

As stated in tender documents.

Minimum level(s) of standards possibly required:

Insurers must be licensed to transact business in the categories mentioned above either in UK or EC Member State of domicile.

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

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: yes

Section IV: Procedure

IV.1. Type of procedure

IV.1.1. Type of procedure

Accelerated negotiated

Unavoidable delay in the preparation of the essential information required to retender prior to expiry of the current insurance arrangements.

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

Envisaged minimum number 3: and Maximum number 5

Objective criteria for choosing the limited number of candidates: As stated in tender documents.

IV.1.3.

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

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

HHC231 Brokerage and Insurance Services Contract 2014

IV.3.2. Previous publication concerning this procedure

no

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: 28.3.2014

Payable documents: no

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

2.4.2014 - 12:00

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

VI.1. Information about recurrence

This is a recurrent procurement: yes

Estimated timing for further notices to be published: 2017

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

Helena Partnerships Ltd manages almost 13,000 homes and its insurance arrangements require extensive resources on the part of insurance service providers. Insurance of social landlords is a highly specialist field, and Helena Partnerships Ltd will require respondents to this notice to be able to demonstrate clearly their ability to deliver the specialist insurance provision required in the RSL sector. This will include providing details of the number of housing associations (not local authorities, charities, care homes or other similar interests)

which you service, the number of units you insure, your main insurance providers, 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 Helena Partnerships Ltd as well as providing competitive insurance terms from experienced RSL insurers.

This insurance programme which is the subject of this tender will include Helena Commercial Services Ltd and all other subsidiaries of Helena Partnerships Ltd.

Helena Partnerships Ltd requires that all insurers proposed for its insurance arrangements shall be at least A rated by Standard & Poors or an equivalent rating agency.

The review is to be a two stage procedure. Responses to this notice in the form of a completed PQQ are required by 12:00 noon on 2.4.2014. Candidates to enter the negotiated stage of the process will be selected from those responses. The final costed tenders from those candidates selected as tenderers must be submitted by 12:00 noon on 20.5.2014.

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

14.3.2014