

United Kingdom-St Helens: Insurance services
OJ S 81/2015 25/04/2015
Contract notice
Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: Torus
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
Telephone: +44 1744675550

Additional information can be obtained from:

Official name: Gibbs Laidler Consulting LLP
Postal address: Falcon House, Black Eagle Square
Town: Westerham
Postal code: TN16 1SE
Country: United Kingdom
For the attention of: Chris Gibbs
E-mail: chris.gibbs@gibbslaidler.co.uk

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

Official name: Gibbs Laidler Consulting LLP
Postal address: Falcon House, Black Eagle Square
Town: Westerham
Postal code: TN16 1SE
Country: United Kingdom
For the attention of: Chris Gibbs
E-mail: chris.gibbs@gibbslaidler.co.uk

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

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

Torus — Brokerage and Insurance Services Contract 2015.

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 North West England but also other locations as required to protect the assets earnings and liabilities of the awarding authority.

NUTS code UK United Kingdom

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)

Type of procedure: Competitive Procedure with Negotiation Torus reserves the right to award the contract on the basis of the initial tenders without conducting negotiations.

Contract documentation is available in electronic format from a secure site. Please contact chris.gibbs@gibbslaidler.co.uk for the URL and access details.

Torus invites tenders to provide brokerage and insurance services.

Brokerage and insurance services may involve insurance broking, insurance underwriting or a combination of both. The term is intended to include the arrangement, placing and administration of insurance policies, which may also include claims settlement and administration, risk management services and any other insurance related services.

The minimum requirements for this procurement are as follows:

- Appropriate insurance protection for the assets, earnings and liabilities of Torus,
- Appropriate claims handling arrangements for all types of losses, with appropriate recording and systems for the provision of meaningful management information,
- Appropriate and effective risk management services, including training and systems for the control and reduction of exposures and losses.

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 one or more 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

Non-life insurance provision and related services.

II.2.2. Information about options

Options: yes

Description of options: Torus 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 1 or 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.2.3. Information about renewals

This contract is subject to renewal: no

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

Information about lots

Lot No: 1

Lot title: Motor Insurances

1) Short description

2) CPV code(s)

66510000 Insurance services

3) Quantity or scope

Motor vehicle insurances and insurance services as required by Torus, and as more fully detailed in the invitation to tender.

4) Indication about different time frame or duration

5) Additional information about lots

Lot No: 2

Lot title: Engineering insurance and inspection

1) Short description

2) CPV code(s)

66510000 Insurance services

3) Quantity or scope

Engineering inspection services and insurances and insurance services as required by Torus, and as more fully detailed in the invitation to tender.

4) Indication about different time frame or duration

5) Additional information about lots

Lot No: 3

Lot title: All Other insurances

1) Short description

2) CPV code(s)

66510000 Insurance services

3) Quantity or scope

Material damage, business interruption, liability, engineering, personal accident, fidelity guarantee, professional indemnity, construction related and other insurances and insurance services as required by Torus, which are not covered in the previous 2 lots, and as more fully detailed in the invitation to tender.

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

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 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.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. Providers of insurance services will be required to be authorised by the Financial Conduct 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

Negotiated

Some candidates have already been selected (if appropriate under certain types of negotiated procedures) no

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: Type of procedure: Competitive Procedure with Negotiation Torus reserves the right to award the contract on the basis of the initial tenders without conducting negotiations. Otherwise as stated in tender documents.

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 yes

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

Torus - Brokerage and Insurance Services Contract 2015

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: 11.5.2015

Payable documents: no

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

20.5.2015 - 16:00

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

27.5.2015

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: 2018.

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 Torus Group combines the strength, skills, local knowledge and strategic intent of two well established housing associations, Helena Partnerships and Golden Gates Housing Trust and the new group owns and manages some 22 000 homes.

Insurance of social landlords is a highly specialist field, and Torus will require respondents to this notice to be able to demonstrate clearly a strong ability to provide insurance in the RSL 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 Torus, as well as providing competitive insurance terms from experienced RSL insurers where relevant. Torus 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 multi-stage procedure. Responses to this notice in the form of a completed TRP are required by 20.5.2015. Candidates to enter the negotiated stage of the process will be selected from those responses. The initial tenders from those candidates selected as tenderers will be submitted on 5.8.2015 in accordance with the timetable which will be set out in the contract documents.

Contract documentation is available in electronic format from a secure site. Please contact chris.gibbs@gibbslaidler.co.uk for the URL and access details.

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

20.4.2015