

United Kingdom-Newbury: Insurance services
OJ S 88/2019 07/05/2019
Contract notice
Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: Sovereign Housing Association Ltd
Postal address: Woodlands, 90 Bartholomew Street
Town: Newbury
NUTS code: UK United Kingdom
Postal code: RG14 5EE
Country: United Kingdom
Contact person: Our Consultant for this project (jeremy.flint@gibbslaidler.co.uk)
E-mail: jeremy.flint@gibbslaidler.co.uk
Telephone: +44 7841632923

Internet address(es):

Main address: www.delta-esourcing.com
Address of the buyer profile: www.sovereign.org.uk

I.3. Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at: <http://www.delta-esourcing.com/tenders/UK-UK-Newbury:-Insurance-services./3QS2F97E28>

Additional information can be obtained from the abovementioned address
Tenders or requests to participate must be submitted to the abovementioned address

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

General (Non-Life) Insurance and Related Services to Sovereign Housing Association Ltd and Subsidiary Organisations

II.1.2. Main CPV code

66510000 Insurance services

II.1.3. Type of contract

Services

II.1.4. Short description

Insurance and related services for property, legal liability and other general (non-life) insurable risks, as required by Sovereign Housing Association Ltd and subsidiary organisations.

II.1.5. Estimated total value

Value excluding VAT: 15 000 000,00 GBP

II.1.6. Information about lots

This contract is divided into lots: yes

Tenders may be submitted for maximum number of lots: 5

Maximum number of lots that may be awarded to one tenderer: 3The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Lots 1-5 will be individually evaluated and therefore multiple awards may result.

Lot 4 may be awarded instead of Lots 1-3.

Lot 5 may be awarded instead of Lot 1.

Where the respondent is an insurance broker, it may choose to place the insurance(s) required within each Lot with different insurers and full details of the risk carriers will be required for evaluation purposes.

II.2. Description

II.2.1. Title

A programme of General Insurance and related services to Sovereign Housing Association Ltd and Subsidiary Organisations

Lot No: 1

II.2.2. Additional CPV code(s)

66510000 Insurance services, 66513100 Legal expenses insurance services, 66513200 Contractor's all-risk insurance services, 66515000 Damage or loss insurance services, 66515100 Fire insurance services, 66515200 Property insurance services, 66515410 Financial loss insurance services, 66515411 Pecuniary loss insurance services, 66516000 Liability insurance services, 66516400 General liability insurance services, 66516500 Professional liability insurance services, 66517300 Risk management insurance services, 66518000 Insurance brokerage and agency services, 66519500 Loss adjustment services

II.2.3. Place of performance

NUTS code: UK United Kingdom

Main site or place of performance: United Kingdom

II.2.4. Description of the procurement

A programme of general insurance and related services for Sovereign Housing Association Ltd and subsidiary organisations, excluding motor fleet risks (see Lot 2) and engineering insurance /inspection (see Lot 3).

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

Value excluding VAT: 15 000 000,00 GBP

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

Start: 05/11/2019 End: 04/11/2022

This contract is subject to renewal: yes

Description of renewals:

Initial contract term is 3 years (or periods of insurance) with an option to extend by up to two years (or periods of insurance), subject to satisfactory performance. The estimated contract value is based upon the five year potential term.

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

Envisaged minimum number: 5 Maximum number: 7 Objective criteria for choosing the limited number of candidates:

This will be a 2 stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards at SQ stage for each lot will be ranked according to the highest score achieved for the specific lot and may be rejected in reverse order to achieve our maximum number of operators for each lot of the ITT stage. Selection criteria for the SQ stage are summarised in this Contract Notice but will be more fully stated in the SQ documentation.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

Sovereign Housing Association Ltd and subsidiary organisations will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or periods of insurance), with an option to extend the award period by up to 2 years (or periods of insurance) subject to satisfactory performance.

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

As stated in the tender documentation.

II.2. Description

II.2.1. Title

Insurance and Related Services for Motor Fleet Risks (including Motor Legal Expenses)
Lot No: 2

II.2.2. Additional CPV code(s)

66510000 Insurance services, 66514110 Motor vehicle insurance services, 66516100 Motor vehicle liability insurance services, 66517300 Risk management insurance services, 66518000 Insurance brokerage and agency services

II.2.3. Place of performance

NUTS code: UK United Kingdom

Main site or place of performance: United Kingdom

II.2.4. Description of the procurement

Insurance and related services for motor fleet risks (including Motor legal expenses).

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

Value excluding VAT: 1 000 000,00 GBP

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

Start: 05/11/2019 End: 04/11/2022

This contract is subject to renewal: yes

Description of renewals:

Initial contract term is 3 years (or periods of insurance) with an option to extend by up to 2 years (or periods of insurance), subject to satisfactory performance. The estimated contract value is based upon the 5 year potential term.

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

Envisaged minimum number: 5 Maximum number: 7 Objective criteria for choosing the limited number of candidates:

This will be a 2 stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards at SQ stage for each lot will be ranked according to the highest score achieved for the specific lot and may be rejected in reverse order to achieve our maximum number of operators for each lot of the ITT stage. Selection criteria for the SQ stage are summarised in this Contract Notice but will be more fully stated in the SQ documentation.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

Sovereign Housing Association Ltd and subsidiary organisations will consider entering into long term agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or periods of insurance), with an option to extend the Award period by up to 2 years (or periods of insurance) subject to satisfactory performance.

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

As stated in the tender documentation.

II.2. Description

II.2.1. Title

Insurance and Related Services Associated with Items of Engineering Plant and a Programme of Engineering Inspections

Lot No: 3

II.2.2.

Additional CPV code(s)

66518000 Insurance brokerage and agency services, 66519200 Engineering insurance services, 71631000 Technical inspection services, 71631100 Machinery-inspection services, 71632200 Non-destructive testing services, 66510000 Insurance services

II.2.3. Place of performance

NUTS code: UK United Kingdom

Main site or place of performance: UNITED KINGDOM.

II.2.4. Description of the procurement

Engineering Insurance and an associated programme of inspections for statutory and other items of engineering plant and equipment including Lifts. The Contracting Authority may require that (Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) Certification is planned 5 monthly, which will allow the Association one month to rebook appointments where access has not been gained. In addition, the Contracting Authority requires that the delivery of LOLER visits is done in line with its 'No access process', this includes evidenced appointments and records of any appointment failures.

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

Value excluding VAT: 250 000,00 GBP

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

Start: 05/11/2019 End: 04/11/2022

This contract is subject to renewal: yes

Description of renewals:

Initial contract term is 3 years (or periods of insurance) with an option to extend by up to two years (or periods of insurance), subject to satisfactory performance. The estimated Contract value is based upon the five year potential term.

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

Envisaged minimum number: 5Maximum number: 7Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards at SQ stage for each Lot will be ranked according to the highest score achieved for the specific Lot and may be rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

Sovereign Housing Association Ltd and subsidiary organisations will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or periods of insurance), with an option to extend the Award period by up to 2 years (or periods of insurance) subject to satisfactory performance.

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

As stated in the Tender documentation.

II.2. Description

II.2.1. Title

An optional Lot enabling Sovereign Housing Association Ltd to consider a combined Award of all insurance and related services required under Lots 1-3
Lot No: 4

II.2.2. Additional CPV code(s)

66510000 Insurance services, 66513100 Legal expenses insurance services, 66513200 Contractor's all-risk insurance services, 66514110 Motor vehicle insurance services, 66515000 Damage or loss insurance services, 66515100 Fire insurance services, 66515200 Property insurance services, 66515410 Financial loss insurance services, 66516100 Motor vehicle liability insurance services, 66516400 General liability insurance services, 66516500 Professional liability insurance services, 66517300 Risk management insurance services, 66518000 Insurance brokerage and agency services, 66519200 Engineering insurance services, 71631000 Technical inspection services, 71631100 Machinery-inspection services, 71632200 Non-destructive testing services

II.2.3. Place of performance

NUTS code: UK United Kingdom
Main site or place of performance: United Kingdom

II.2.4. Description of the procurement

An optional Lot enabling Sovereign Housing Association Ltd and subsidiary organisations to consider a combined Award of all insurance and related services required under Lots 1-3. Sovereign reserves its right to award Lot 1, Lot 4, or Lot 5 at its sole discretion. Each Lot will be fairly and individually evaluated.

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

Value excluding VAT: 15 000 000,00 GBP

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

Start: 05/11/2019 End: 04/11/2022

This contract is subject to renewal: yes

Description of renewals:

Initial contract term is 3 years (or periods of insurance) with an option to extend by up to two years (or periods of insurance), subject to satisfactory performance. The estimated Contract value is based upon the five year potential term.

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

Envisaged minimum number: 5Maximum number: 7Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards at SQ stage for each Lot will be ranked according to the highest score achieved for the specific Lot and may be rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

Sovereign Housing Association Ltd and subsidiary organisations will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or periods of insurance), with an option to extend the Award period by up to 2 years (or periods of insurance) subject to satisfactory performance.

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

As stated in the Tender documentation.

II.2. Description

II.2.1. Title

Optional Lot for Insurance and/or Alternative Risk Financing associated with the Insurable Risks of Sovereign Housing Association Ltd and Subsidiary Organisations, excluding Motor Fleet and Engineering
Lot No: 5

II.2.2. Additional CPV code(s)

66510000 Insurance services, 66513100 Legal expenses insurance services, 66513200 Contractor's all-risk insurance services, 66515000 Damage or loss insurance services, 66515200 Property insurance services, 66515410 Financial loss insurance services, 66516000 Liability insurance services, 66516400 General liability insurance services, 66516500 Professional liability insurance services, 66517300 Risk management insurance services, 66518000 Insurance brokerage and agency services, 66519500 Loss adjustment services

II.2.3. Place of performance

NUTS code: UK United Kingdom

Main site or place of performance: UNITED KINGDOM

II.2.4. Description of the procurement

An optional Lot to enable Sovereign to consider its options for alternative risk financing including a Captive or Protected Cell Company for its core insurable risks including property

and third party liability risks. We anticipate this Lot will require a mixture of traditional and ARF. Sovereign therefore reserves its right to award Lot 1, Lot 4, or Lot 5 at its sole discretion. Each Lot will be fairly and individually evaluated.

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

Value excluding VAT: 15 000 000,00 GBP

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

Start: 05/11/2019 End: 04/11/2022

This contract is subject to renewal: yes

Description of renewals:

Initial contract term is 3 years (or periods of insurance) with an option to extend by up to two years (or periods of insurance), subject to satisfactory performance. The estimated Contract value is based upon the five year potential term.

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

Envisaged minimum number: 5 Maximum number: 7 Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards at SQ stage for each Lot will be ranked according to the highest score achieved for the specific Lot and may be rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: yes

Description of options:

Sovereign Housing Association Ltd and subsidiary organisations will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or periods of insurance), with an option to extend the Award period by up to 2 years (or periods of insurance) subject to satisfactory performance.

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

As stated in the Tender documentation.

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 suppliers will be required to provide an overview of services provided to property owners, public sector organisations, social landlords or other relevant organisations over the past 5 years, plus details of 3 clients currently receiving similar services. Potential suppliers will be asked to evidence permissions by the FCA, PRA or other appropriate regulatory authority indicating the types of insurance/service the bidder is authorised to arrange or provide.

III.1.2. Economic and financial standing

List and brief description of selection criteria:

The tender documents will require providers to produce financial information in relation to the type of services offered, including but not limited to 2 years reports and accounts.

Minimum level(s) of standards possibly required:

The financial ability to deliver the programme, including insurers with a minimum Rating of “BBB” from Standard and Poor, “B++” from A M Best, or an equivalent rating by an independent and reputable Credit Rating Agency and approved by the bidder’s Market Security Committee. In the case of any Rating less than A-, Sovereign will evaluate and accept the nominated Insurer(s) at its sole discretion, subject to disclosure and acceptance prior to the Bid deadline of the Bidder’s Market Security Committee’s latest report, including written recommendation from the bidder’s Market Security Committee.

III.1.3. Technical and professional ability

List and brief description of selection criteria:

The tender documents will require providers to detail their relevant professional experience, resource, skills, qualifications and quality control practices.

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:

For Insurance services, Insurers authorised under the Financial services and Markets Act 2000, Insurance Companies Act 1982 (and any other statutory modifications thereof) and regulated by the Prudential regulation authority, UK Financial conduct authority, or equivalent in another member state of the European economic area. Insurance brokers registered with and regulated by the Financial conduct authority.

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.1.4.

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

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.2.1. Previous publication concerning this procedure

Notice number in the OJ S: [2019/S 040-090458](#)

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

Date: 04/06/2019 Local time: 10:00

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

Date: 13/06/2019

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

English

IV.2.6. Minimum time frame during which the tenderer must maintain the tender

Tender must be valid until: 05/11/2019

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: no

VI.2. Information about electronic workflows

Electronic invoicing will be accepted

Electronic payment will be used

VI.3. Additional information

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

Bidders should note that for reasons of confidentiality, full Tender information will be made available only to those bidders that are selected to proceed to the ITT Stage. Sufficient detail is provided within this Notice, the SQ and via the Authority's e-procurement portal to enable the Bidder to decide whether to participate in this process. At the ITT stage, all respondents will be required to detail your proposed insurance wordings and provide details of relevant experience of all account servicing, claims handling and risk management staff. GO Reference: GO-201953-PRO-14861703

VI.4. Procedures for review

VI.4.1.

Review body

Official name: The High Court of England and Wales

Town: London

Country: United Kingdom

VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

The Contracting Authority will enter into this contract following a 10 calendar day standstill period starting on the day after the notification of the result. The Public Contracts Regulations 2015 provide for aggrieved parties who have been harmed or who are at risk of harm by a breach of the Regulations to bring proceedings in the High Court. Any such proceedings must be brought within the limitation period specified by the Regulations according to the remedy sought.

VI.5. Date of dispatch of this notice

03/05/2019