

United Kingdom-Sale: Insurance services
OJ S 136/2017 19/07/2017
Contract notice
Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: The Dean Trust

Postal address: Ashton on Mersey School, Cecil Avenue

Town: Sale

NUTS code: UKD North West (England)

Postal code: M33 5BP

Country: United Kingdom

Contact person: Catherine Duncan

E-mail: contract.manager@theriskfactor.com

Telephone: +44 3300563360

Internet address(es):

Main address: www.thedeantrust.co.uk

I.3. Communication

Access to the procurement documents is restricted. Further information can be obtained at:

www.theriskfactor.com/potential-bidders.php

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

Education

Section II: Object

II.1. Scope of the procurement

II.1.1. Title

Insurance Services — Excluding Insurance Broker Services.

II.1.2. Main CPV code

66510000 Insurance services

II.1.3. Type of contract

Services

II.1.4. Short description

Insurance and related claims services but excluding broker services for Property, Liability and other general non-life insurance on behalf of those schools and establishments which form part of The Dean Trust.

II.1.5. Estimated total value

Value excluding VAT: 330 000,00 GBP

II.1.6. Information about lots

This contract is divided into lots: yes
Tenders may be submitted for all lots

II.2. Description

II.2.1. Title

Combined Liability including Financial Loss, Governors Liability, Libel and Slander and Hirers Liability
Lot No: 1

II.2.2. Additional CPV code(s)

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

II.2.3. Place of performance

NUTS code: UKD North West (England)
Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance coverage required for Employers Liability, Public and Products Liability including Financial Loss, Governors Liability, Libel and Slander and Hirers Liability.

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: 150 000,00 GBP

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

Duration in months: 36
This contract is subject to renewal: yes
Description of renewals:
The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes
Description of options:
Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

II.2. Description

II.2.1. Title

Motor Fleet
Lot No: 2

II.2.2. Additional CPV code(s)

66514110 Motor vehicle insurance services, 66516100 Motor vehicle liability insurance services, 66513100 Legal expenses insurance services

II.2.3. Place of performance

NUTS code: UKD North West (England)

Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance coverage required for Motor Fleet Insurance with an option to include uninsured loss recovery services.

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: 15 000,00 GBP

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

Duration in months: 36

This contract is subject to renewal: yes

Description of renewals:

The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes

Description of options:

Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

II.2. Description

II.2.1. Title

Property
Lot No: 3

II.2.2. Additional CPV code(s)

66515200 Property insurance services, 66515100 Fire insurance services, 66515000 Damage or loss insurance services, 66515400 Weather-related insurance services

II.2.3. Place of performance

NUTS code: UKD North West (England)

Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance cover for Property, Business Interruption, Money and Fidelity Guarantee.

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: 125 000,00 GBP

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

Duration in months: 36

This contract is subject to renewal: yes

Description of renewals:

The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes

Description of options:

Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

II.2. Description

II.2.1. Title

Engineering and Inspection
Lot No: 4

II.2.2.

Additional CPV code(s)

66515000 Damage or loss insurance services, 66519200 Engineering insurance services

II.2.3. Place of performance

NUTS code: UKD North West (England)

Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance coverage required for Statutory Inspections and Engineering Insurance.

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: 10 000,00 GBP

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

Duration in months: 36

This contract is subject to renewal: yes

Description of renewals:

The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes

Description of options:

Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

II.2. Description**II.2.1. Title**

Personal Accident / Travel

Lot No: 5

II.2.2. Additional CPV code(s)

66512000 Accident and health insurance services

II.2.3. Place of performance

NUTS code: UKD North West (England)

Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance coverage required for Personal Accident and School Journey Travel Insurance.

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: 10 000,00 GBP

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

Duration in months: 36

This contract is subject to renewal: yes

Description of renewals:

The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes

Description of options:

Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

II.2. Description

II.2.1. Title

Legal Expenses

Lot No: 6

II.2.2. Additional CPV code(s)

66513100 Legal expenses insurance services

II.2.3. Place of performance

NUTS code: UKD North West (England)

Main site or place of performance: Focused around the Head Office in Cheshire plus other areas as they form part of the Trust and as necessary to fulfil the contract.

II.2.4. Description of the procurement

Insurance coverage required for Legal Expenses Insurance.

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: 20 000,00 GBP

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

Duration in months: 36

This contract is subject to renewal: yes

Description of renewals:

The contract will be awarded on the basis of a 3 year agreement subject to a long term undertaking over this period The option of a further 1 or 2 year extension may be taken.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: yes

Description of options:

Options will be considered provided that the Total Cost of insurance and potential self-insurance meet the appetite of the trust.

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 documents.

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:

This tender is open to all Insurers, facilities and schemes which are underwritten by a firm which authorised by the Financial Conduct Authority and regulated by the Prudential Regulations Authority and is licensed to provide Insurance within the UK.

III.1.2. Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3. Technical and professional ability

Selection criteria as stated in the procurement documents

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.

Section IV: Procedure

IV.1. Description

IV.1.1. Type of procedure

Open procedure

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

IV.1.8. Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: yes

IV.2. Administrative information

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

Date: 17/08/2017 Local time: 17:00

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

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: 01/10/2017

IV.2.7. Conditions for opening of tenders

Date: 17/08/2017 Local time: 17:01

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

The proposed contract period is on the basis of a 3 year agreement with an option to extend up to a further 2 Years. It is anticipated that the next notice will be published between May 2020 — May 2022.

VI.3. Additional information

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.4.2. Body responsible for mediation procedures

Official name: Stone King Solicitors

Town: Leeds

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

Official name: The Cabinet Office

Town: London

Country: United Kingdom

VI.5. Date of dispatch of this notice

17/07/2017