

United Kingdom-Kendal: Insurance services

OJ S 208/2017 28/10/2017

Contract notice

Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: South Lakes Housing

Postal address: Bridge Mills Business Centre, Stramongate

Town: Kendal

NUTS code: UKD1 Cumbria

Postal code: LA9 4BD

Country: United Kingdom

Contact person: Our Consultant — Maureen batten

E-mail: maureenmbatten@btinternet.com

Telephone: +44 7920131507

Internet address(es):Main address: www.southlakeshousing.co.ukAddress of the buyer profile: https://www.mytenders.co.uk/search/Search_AuthProfile.aspx?ID=AA0432**I.3. Communication**

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

<https://www.mytenders.co.uk>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://www.mytenders.co.uk>**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**

Tender for Insurance and Related Services — 2018.

II.1.2. Main CPV code

66510000 Insurance services

II.1.3. Type of contract

Services

II.1.4. Short description

The Contract is for the provision of general insurance cover and related services, including claims handling, loss control services, engineering inspections and general programme maintenance and advice as required by South Lakes Housing. Bidders are requested to bid for the entire scope of services. The procurement will follow the 2-stage Restricted Procedure, with bidders pre-qualified on the basis of capability, capacity and economic and financial standing using the attached pre-qualifying SQ.

II.1.5. Estimated total value

II.1.6. Information about lots

This contract is divided into lots: no

II.2. Description

II.2.2. Additional CPV code(s)

66512100 Accident insurance services, 66513100 Legal expenses insurance services, 66516400 General liability insurance services, 66515411 Pecuniary loss insurance services, 66515410 Financial loss insurance services, 66513200 Contractor's all-risk insurance services , 66515000 Damage or loss insurance services, 66516500 Professional liability insurance services, 66515200 Property insurance services, 66515100 Fire insurance services, 66516000 Liability insurance services, 66518100 Insurance brokerage services, 66514110 Motor vehicle insurance services, 66516100 Motor vehicle liability insurance services, 66513000 Legal insurance and all-risk insurance services

II.2.3. Place of performance

NUTS code: UKD1 Cumbria

Main site or place of performance: Cumbria.

II.2.4. Description of the procurement

This Contract is for the provision of Insurance cover, related advice, claims management and loss control services for property, legal liabilities, engineering insurance and inspection and other general(non-life) insurances as required by South Lakes Housing for a period of 3 (years (or periods of insurance) commencing 1.4.2018, with the option to extend by up to a further 2 years at the company's sole discretion, subject to satisfactory performance.

The contract is not divided into lots so bidders are required to bid for the entire scope of services. Bids are invited from suitably qualified and experienced insurance brokers or direct insurers.

The Contract will follow the Restricted Procedure with a pre-qualifying stage based on submission of a satisfactory SQ and bidders will be selected on the basis of their capability, capacity and experience to perform the contract. Those selected will be invited to submit a Tender.

The Contract will be awarded on the basis of Most Economically Advantageous Tender, with specific evaluation criteria detailed within the ITT and contract documents.

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

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

Start: 01/04/2018 End: 31/03/2021

This contract is subject to renewal: yes

Description of renewals:

Initial award for a period of 36 months, with an option to extend for up to a further 24 months at the discretion of South :Lakes Housing.

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

Envisaged minimum number: 3 Maximum number: 6 Objective criteria for choosing the limited number of candidates:

Availability of suitably qualified, competent and experienced candidates.

II.2.10. Information about variants

Variants will be accepted: yes

II.2.11. Information about options

Options: no

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

Economic operators may be excluded from this competition if they are in any of the situations referred to in regulation 57 of the Public Contracts Regulations 2015. Bidders will be selected to proceed to Stage 2 on the basis of an assessment of completed SQs submitted.

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:

As a minimum, you are required to demonstrate:

— you are an insurance broker registered with and regulated by the UK Financial Conduct Authority or an insurer authorised and/or regulated by the UK Financial Conduct Authority or Prudential Regulation Authority or equivalent in another member state of the European Economic Area indicating the types of insurance/service the bidder is authorised to arrange or provide (See section 4 of the SQ).

III.1.2. Economic and financial standing

List and brief description of selection criteria:

The financial ability and strength to deliver the programme (see section 5 of SQ)

— use of insurers with a Standard and Poors (or equivalent) rating of A- or above is preferred (see question 5.4 of SQ).

Minimum level(s) of standards possibly required:

Information and formalities necessary for evaluating if requirements are met:

(1) All candidates will be required to provide evidence of relevant professional risk indemnity insurance.

(2) All candidates will be required to provide a statement, covering the 3 previous financial years including the overall turnover of the candidate and the turnover in respect of the activities which are of a similar type to the subject matter of this notice.

(3) All candidates will be required to provide statements of accounts or extracts from those accounts relating to their business.

III.1.3. Technical and professional ability

List and brief description of selection criteria:

- a record of successful provision of relevant services to property owners, social housing organisations or other organisations that are similar in profile to the contracting authority,
- a skilled and competent service team, being client relationship management, technical staff, broking/underwriting expertise, claims managers and risk managers,
- your commitment to delivering quality service to South Lakes Housing, including that provided to us by any third party contractor employed by you or by the insurers you propose,
- your ability to demonstrate client satisfaction on at least 3 similar contracts,
- CII chartered form status and/or commitment to its Code of Ethics, commitment to corporate and individual professional development defined by the CII or similar professional organisation.

Minimum level(s) of standards possibly required:

- A statement of the candidate's average annual number of staff and managerial staff over the previous 3 years;
- Details of the educational and professional qualifications of their managerial staff; and those of the person(s) who would be responsible for providing the services or carrying out the work or works under the contract;
- An indication of the proportion of the contract which the services provider intends possibly to subcontract.

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:

Execution of the service is reserved to suitably qualified, registered and experienced insurance providers, brokers and direct insurers.

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

Restricted 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: 27/11/2017 Local time: 15:00

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

Date: 30/11/2017

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: 02/04/2018

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

36 or 60 months from 1.4.2018.

VI.3. Additional information

Selection of bidders - Questions in SQ aligned with financial, economic and technical requirements stated in Contract Notice where appropriate.

Full information on specification of the service will be detailed in the Invitation to Tender which will be issued to selected bidder Stage 2 of this procurement.

Note: To register your interest in this notice and obtain any additional information please visit the myTenders Web Site at http://www.myTenders.org/Search/Search_Switch.aspx?ID=203190

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at http://www.myTenders.org/sitehelp/help_guides.aspx

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(MT Ref:203190).

VI.4. Procedures for review

VI.4.1. Review body

Official name: South Lakes Housing

Postal address: Bridge Mills Business Centre, Stramongate

Town: Kendal

Postal code: LA9 4BD

Country: United Kingdom

E-mail: l.simons@southlakeshousing.co.uk

Telephone: +44 3003038540

Internet address: www.southlakeshousing.co.uk

VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

Mandatory standstill period will apply in accordance with Regulation 87 of the Public Contracts Regulations 2015.

VI.5. Date of dispatch of this notice

27/10/2017