

This notice in TED website: <https://ted.europa.eu/udl?uri=TED:NOTICE:478608-2020:TEXT:EN:HTML>

**United Kingdom-Somerset: Insurance services
2020/S 197-478608**

Contract notice

Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1) Name and addresses

Official name: Alliance Homes
Postal address: 40 Martingale Way, Portishead
Town: Somerset
NUTS code: UKK SOUTH WEST (ENGLAND)
Postal code: BS20 7AW
Country: United Kingdom
Contact person: Our Consultant for this Project Gibbs Laidler Consulting
E-mail: Jenny.aley@gibbslaidler.co.uk
Telephone: +44 1959562242

Internet address(es):

Main address: <https://www.alliancehomes.org.uk/>

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://www.delta-esourcing.com/tenders/UK-UK-Somerset:-Insurance-services./76BPDE95UW>
Additional information can be obtained from the abovementioned address
Tenders or requests to participate must be submitted electronically via: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>
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:

Provision of Insurance and Related Services to Alliance Homes

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 Alliance Homes.

II.1.5) **Estimated total value**

Value excluding VAT: 1 500 000.00 GBP

II.1.6) **Information about lots**

This contract is divided into lots: yes

Tenders may be submitted for maximum number of lots: 6

Maximum number of lots that may be awarded to one tenderer: 5

The contracting authority reserves the right to award contracts combining the following lots or groups of lots: Lots 1-5 will be individually evaluated and multiple awards may result. Where the respondee is an insurance Broker, it may choose to place the insurance(s) required within each lot with different insurers at it's discretion, but full details of the risk carrier(s) will be required.

II.2) **Description**

II.2.1) **Title:**

Insurance and Related Services for Property, Legal Liability and Other General (Non-life) Insurable Risks, as required by Alliance Homes

Lot No: 1

II.2.2) **Additional CPV code(s)**

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
66518300 Insurance claims 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 (non-life) insurance and related services for Alliance Homes, excluding Motor fleet risks (see Lot 2), Engineering Inspections (see Lot 3), Terrorism Insurance (see Lot 4) and Cyber risks (See Lot 5).

The programme will require Insurance and related services for risks that may include but not be limited to: property damage and business interruption, employers, public, products and property owners liability, business combined/office, money, all risks, computer, contract works, group personal accident, professional indemnity, fidelity guarantee/crime and employment practices 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: 1 125 000.00 GBP
- II.2.7) **Duration of the contract, framework agreement or dynamic purchasing system**
Start: 28/02/2021
End: 27/02/2024
This contract is subject to renewal: yes
Description of renewals:
Alliance Homes will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.
- II.2.9) **Information about the limits on the number of candidates to be invited**
Envisaged minimum number: 3
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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe 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:
Alliance Homes will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.
- 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**
For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>
- II.2) **Description**
- II.2.1) **Title:**
Insurance and Related Services for Motor Vehicle Risks (Possibly including Motor Legal Expenses and Occasional Business Use)
Lot No: 2
- II.2.2) **Additional CPV code(s)**
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 vehicle risks (possibly including Motor legal expenses and Occasional business use extensions).

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: 165 000.00 GBP

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

Start: 28/02/2021

End: 27/02/2024

This contract is subject to renewal: yes

Description of renewals:

Alliance Homes will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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

Envisaged minimum number: 3

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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe 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:

Alliance Homes will consider entering into long term agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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.

For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>

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)**

66000000 Financial and insurance services

66510000 Insurance services

66517300 Risk management insurance services

66518300 Insurance claims adjustment services

66519200 Engineering insurance services

71631100 Machinery-inspection services

71631000 Technical 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:**

Engineering Insurance and an associated programme of inspections for statutory and other items of engineering plant and equipment. The contracting authority may require that LOLER Certification is planned 5 monthly, which will allow the Association one month to re-book 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: 90 000.00 GBP

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

Start: 28/02/2021

End: 27/02/2024

This contract is subject to renewal: yes

Description of renewals:

Alliance Homes will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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

Envisaged minimum number: 3

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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific lot and maybe 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:

Alliance homes will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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**

For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>

II.2) **Description**

II.2.1) **Title:**

Insurance and Related Services Associated with Terrorism Risk for Alliance Homes
Lot No: 4

II.2.2) **Additional CPV code(s)**

66000000 Financial and insurance services
66510000 Insurance services
66517300 Risk management insurance services
66515000 Damage or loss 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 associated with Terrorism risks for Alliance homes.

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: 60 000.00 GBP

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

Start: 28/02/2021

End: 27/02/2024

This contract is subject to renewal: yes

Description of renewals:

Alliance homes will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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

Envisaged minimum number: 3

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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe 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:

Alliance Homes will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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**

For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>

II.2) **Description**

II.2.1) **Title:**

Insurance and Related Services Associated with Cyber Risks for Alliance Homes
Lot No: 5

II.2.2) **Additional CPV code(s)**

66000000 Financial and insurance services
66510000 Insurance services
66517300 Risk management insurance services
66516000 Liability 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 associated with cyber risks for Alliance Homes.

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: 60 000.00 GBP

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

Start: 28/02/2021

End: 27/02/2024

This contract is subject to renewal: yes

Description of renewals:

Alliance homes will consider entering into long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.

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

Envisaged minimum number: 3

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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific lot and maybe 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:

Alliance homes will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or 3 periods of insurance), with an option to extend the award period subject to service, performance and cost.

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**

For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset:-Insurance-services./76BPDE95UW>

II.2) **Description**

II.2.1) **Title:**

An Optional Lot for a Single Programme of General (Non-life) Insurance and Related Services for Alliance Homes and Subsidiary Organisations including all of Lots 1-5, and Combining all Insurance Covers into a Single Award

Lot No: 6

II.2.2) **Additional CPV code(s)**

66000000 Financial and insurance services

66510000 Insurance services

66517300 Risk management insurance services

66500000 Insurance and pension 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 for a single programme of general (non-life) Insurance and related services for Alliance Homes and subsidiary organisations including all of Lots 1-5, and combining all insurance covers into a single award

- 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: 1 500 000.00 GBP
- II.2.7) **Duration of the contract, framework agreement or dynamic purchasing system**
Start: 28/02/2021
End: 27/02/2024
This contract is subject to renewal: yes
Description of renewals:
Alliance homes will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years, subject to satisfactory service, performance and cost.
- II.2.9) **Information about the limits on the number of candidates to be invited**
Envisaged minimum number: 3
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 for each lot at SQ stage will be ranked according to the highest score achieved for the specific lot and maybe 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:
Alliance Homes will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carriers for 3 years (or 3 periods of insurance), with an option to extend the award period subject to service, performance and cost.
- 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**
For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-US-Somerset-Insurance-services/76BPDE95UW>

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 3 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-, Alliance homes will evaluate and accept the nominated insurer(s) at its sole discretion, subject to disclosure and acceptance prior to the ITT 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 there of) 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.2.2) Time limit for receipt of tenders or requests to participate

Date: 05/11/2020

Local time: 17:00

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

Date: 11/11/2020

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: 27/02/2021

Section VI: Complementary information

VI.1) **Information about recurrence**

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

Between 3 or 5 years from the date of this notice.

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 or not 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.

For more information about this opportunity, please visit the Delta eSourcing portal at:

<https://www.delta-esourcing.com/tenders/UK-UK-Somerset:-Insurance-services./76BPDE95UW>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/76BPDE95UW>

GO Reference: GO-2020106-PRO-17181050

VI.4) **Procedures for review**

VI.4.1) **Review body**

Official name: The High Court of England and Wales

Town: London

Country: United Kingdom

Telephone: +44 1959562242

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

Telephone: +44 1959562242

VI.5) **Date of dispatch of this notice:**
06/10/2020