

**United Kingdom-Newbury: Insurance services**  
**OJ S 238/2019 10/12/2019**  
**Contract award notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**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](mailto:jeremy.flint@gibbslaidler.co.uk))  
E-mail: [jeremy.flint@gibbslaidler.co.uk](mailto:jeremy.flint@gibbslaidler.co.uk)  
Telephone: +44 7841632923  
**Internet address(es):**  
Main address: [www.delta-esourcing.com](http://www.delta-esourcing.com)  
Address of the buyer profile: [www.sovereign.org.uk](http://www.sovereign.org.uk)

**I.4. Type of the contracting authority**

Body governed by public law

**I.5. Main activity**

Housing and community amenities

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**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.1.6. Information about lots**

This contract is divided into lots: yes

### **II.1.7. Total value of the procurement**

Value excluding VAT: 15 000 000,00 GBP

## **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**

Quality criterion - Name: Quality score / Weighting: 60  
Cost criterion - Name: Commercial costs / Weighting: 40

### **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**

Quality criterion - Name: Quality score / Weighting: 60

Cost criterion - Name: Commercail score / Weighting: 40

**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 1 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**

Quality criterion - Name: Quality score / Weighting: 60

Cost criterion - Name: Commercial costs / Weighting: 40

#### **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**

Quality criterion - Name: Quality score / Weighting: 60

Cost criterion - Name: Commercial costs / Weighting: 40

### **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**

Quality criterion - Name: Quality score / Weighting: 60

Cost criterion - Name: Commercial costs / Weighting: 40

### **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 IV: Procedure**

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**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.1.8. 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 088-211393](#)

**IV.2.8. Information about termination of dynamic purchasing system**

**IV.2.9. Information about termination of call for competition in the form of a prior information notice**

**Section V: Award of contract**

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**Lot No: 4**

**Title:**

Optional Lot Allowing the Combined award of all Insurance related Services Required under Lots 1 -3

A contract/lot is awarded: yes

**V.2. Award of contract**

**V.2.1. Date of conclusion of the contract**

05/11/2019

**V.2.2. Information about tenders**

Number of tenders received: 5

The contract has been awarded to a group of economic operators: no

**V.2.3. Name and address of the contractor**

Official name: Zurich Municipal plc

Postal address: The Zurich Centre, 3000 Parkway, Fareham  
Town: Whiteley  
NUTS code: UK United Kingdom  
Postal code: PO15 7JZ  
Country: United Kingdom  
The contractor is an SME: no

**V.2.4. Information on value of the contract/lot**

Total value of the contract/lot: 15 000 000,00 GBP

**V.2.5. Information about subcontracting**

**Section VI: Complementary information**

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**VI.3. Additional information**

Any selection of tenderers will be based solely on the criteria set out for the procurement. Bidders must note that for confidentiality, tender information will be made available only to bidders that are selected to proceed to ITT. Detail is provided within this Notice, SQ & the authority's e-portal to enable bidders to decide whether to participate in this process. At ITT bidders will be required to detail proposed insurance wordings and provide details of relevant experience of all account servicing, claims handling and risk management staff. In accordance with Regulation 86(6)(b) (which allows a contracting authority to withhold any information which would prejudice the legitimate commercial interests of a particular economic operator) we have not disclosed the exact contract value

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=453630592>

Go reference: GO-2019126-PRO-15655437

**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**

06/12/2019