

**United Kingdom-Rochdale: Insurance services**  
**OJ S 248/2019 24/12/2019**  
**Contract notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: Rochdale Boroughwide Housing Ltd

Postal address: Sandbrook House, Sandbrook Way

Town: Rochdale

NUTS code: UKD North West (England)

Postal code: OL11 1RY

Country: United Kingdom

Contact person: Our Consultant for this project (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: <https://gibbslaidler.delta-esourcing.com/>

Address of the buyer profile: <https://www.rbh.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-Rochdale:-Insurance-services./3QED7BV35V>

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

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**Section II: Object**

**II.1. Scope of the procurement**

**II.1.1. Title**

Provision of General (Non-Life) Insurance, Death in Service Insurance and Other Related Services to Rochdale Boroughwide Housing Ltd

**II.1.2. Main CPV code**

66510000 Insurance services

**II.1.3. Type of contract**

Services

#### **II.1.4. Short description**

General (non-life) insurance, death in service insurance and other related services to Rochdale Boroughwide Housing Ltd and subsidiary organisations.

#### **II.1.5. Estimated total value**

Value excluding VAT: 2 500 000,00 GBP

#### **II.1.6. Information about lots**

This contract is divided into lots: yes

Tenders may be submitted for maximum number of lots: 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 1-3 and 5 will be individually evaluated and multiple awards may result. Individual lots will not be divided further into sub-lots. Lot 4 may be awarded instead of Lots 1-3. Where the respondent is an insurance broker/IFA, 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**

General (Non-Life) Insurance and Related Services for Rochdale Boroughwide Housing 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, 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: UKD North West (England)

Main site or place of performance: North West (ENGLAND).

#### **II.2.4. Description of the procurement**

A programme of general insurance and related services for Rochdale Boroughwide Housing 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: 2 500 000,00 GBP

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

Start: 01/06/2020 End: 31/05/2023

This contract is subject to renewal: yes

Description of renewals:

The initial contract term is 3 years (or 3 periods of insurance) with an option to extend by up to 2 years (or 2 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: 3 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 for each lot at SQ stage 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:

Rochdale Boroughwide Housing 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 3 periods of insurance), with an option to extend the award period by up to 2 years (or 2 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 Vehicle Risks (Possibly including Motor Legal Expenses and Occasional Business Use)

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: UKD North West (England)

Main site or place of performance: North West (ENGLAND).

#### **II.2.4. Description of the procurement**

Insurance and related services for motor fleet risks (possibly including motor legal expenses and occasional business use).

#### **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: 01/06/2020 End: 31/05/2023

This contract is subject to renewal: yes

Description of renewals:

The initial contract term is 3 years (or 3 periods of insurance) with an option to extend by up to 2 years (or 2 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: 3Maximum number: 7Objective 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 for each lot at SQ stage 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:

Rochdale Boroughwide Housing 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 three periods of insurance), with an option to extend the award period by up to 2 years (or 2 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)**

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

**II.2.3. Place of performance**

NUTS code: UKD North West (England)

Main site or place of performance: North West (ENGLAND).

**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 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: 100 000,00 GBP

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

Start: 01/06/2020 End: 31/05/2023

This contract is subject to renewal: yes

Description of renewals:

The initial contract term is 3 years (or 3 periods of insurance) with an option to extend by up to 2 years (or 2 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: 3Maximum number: 7Objective 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 for each lot at SQ stage 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:

Rochdale Boroughwide Housing 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 3 periods of insurance), with an option to extend the award period by up to 2 years (or 2 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 Rochdale Boroughwide Housing 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, 66516000 Liability 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: UKD North West (England)

Main site or place of performance: North West (ENGLAND).

### **II.2.4. Description of the procurement**

An optional lot enabling Rochdale Boroughwide Housing Ltd and subsidiary organisations to consider a combined award of all insurance and related services required under Lots 1-3. RBH reserves its right to award Lot 1-3 or Lot 4 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: 2 500 000,00 GBP

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

Start: 01/06/2020 End: 31/05/2023

This contract is subject to renewal: yes

Description of renewals:

The initial contract term is 3 years (or 3 periods of insurance) with an option to extend by up to 2 years (or 2 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: 3 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 for each lot at SQ stage 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:

Rochdale Boroughwide Housing 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 3 periods of insurance), with an option to extend the award period by up to 2 years (or 2 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**

Death in Service Insurance and Related Services to Rochdale Boroughwide Housing Ltd and Subsidiary Organisations  
Lot No: 5

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

66500000 Insurance and pension services, 66511000 Life insurance services, 66512000 Accident and health insurance services, 66518000 Insurance brokerage and agency services

**II.2.3. Place of performance**

NUTS code: UKD North West (England)

Main site or place of performance: North West (ENGLAND).

**II.2.4. Description of the procurement**

Death in service insurance and related services for Rochdale Boroughwide Housing Ltd and subsidiary organisations.

**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: 50 000,00 GBP

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

Start: 01/06/2020 End: 31/05/2023

This contract is subject to renewal: yes

Description of renewals:

The initial contract term is 3 years (or 3 periods of insurance) with an option to extend by up to 2 years (or 2 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: 3 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 for each lot at SQ stage 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:

Rochdale Boroughwide Housing Ltd and subsidiary organisations will consider entering into long term agreements with the bidder and/or the bidder's proposed risk carrier for three years (or three periods of insurance), with an option to extend the award period by up to 2 years (or 2 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**

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#### **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-, Rochdale Boroughwide Housing Ltd 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**

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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.1.4. 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: 24/01/2020 Local time: 12:00

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

Date: 28/01/2020

#### **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: 31/05/2020

### **Section VI: Complementary information**

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#### **VI.1. Information about recurrence**

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

Between 3 to 5 years from the date of this contract 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 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://gibbslaidler.delta-esourcing.com/tenders/UK-UK-Rochdale:-Insurance-services./3QED7BV35V>

To respond to this opportunity, please click here:

<https://gibbslaidler.delta-esourcing.com/respond/3QED7BV35V>

GO Reference: GO-20191220-PRO-15717536

#### **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**

20/12/2019