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Tender

## **Provision of Insurance and related services to the Swaythling Housing Society trading as Abri and subsidiaries**

The Swaythling Housing Society trading as Abri

F02: Contract notice

Notice identifier: 2021/S 000-000897

Procurement identifier (OCID): ocids-h6vhtk-028ad7

Published 15 January 2021, 4:23pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

The Swaythling Housing Society trading as Abri

Collins House, Bishopstoke Road

Eastleigh

SO50 6AD

#### **Contact**

Our Consultant for this Project Gibbs Laidler Consulting - via Correspondence function of In-Tend

#### **Email**

[Paul.Anderson-Turner@radian.co.uk](mailto:Paul.Anderson-Turner@radian.co.uk)

#### **Telephone**

+44 3001231567

**Fax**

+44 2380628390

**Country**

United Kingdom

**NUTS code**

UK - UNITED KINGDOM

**National registration number**

10237R

**Internet address(es)**

Main address

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

Buyer's address

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

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://in-tendhost.co.uk/radian/aspx/Home>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://in-tendhost.co.uk/radian/aspx/Home>

Tenders or requests to participate must be submitted to the above-mentioned 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 Insurance and related services to the Swaythling Housing Society trading as Abri and subsidiaries

Reference number

P/RAD 0795/2021

#### **II.1.2) Main CPV code**

- 66000000 - Financial and 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 Swaythling Housing Society trading as Abri. The following opportunity is being managed and performed by our Insurance Consultancy: Gibbs Laidler, on behalf of the Swaythling Housing Society trading as Abri and its subsidiary organisations (Abri), to identify suitable provision of Insurance and related services, and claims handling services as required. This opportunity is run in connection with a competitive procurement process conducted in accordance with Regulation 28 of the Public Contracts Regulations 2015. For more information on Abri please go to our website at [www.abri.co.uk](http://www.abri.co.uk). Experienced providers interested in delivering Insurance services to Abri should register their organisation on our procurement portal In-Tend and register their interest by expressing an interest in the project. The tender documentation will then become available.

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Lots 1-6 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**

Main Programme: Insurance and related services for Property, legal liability and other general (non-life) insurable risks, as required by Abri and subsidiary organisations

Lot No

1

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

- 66510000 - Insurance services
- 66515200 - Property insurance services
- 66515411 - Pecuniary loss insurance services
- 66518000 - Insurance brokerage and agency services
- 66000000 - Financial and insurance services
- 66518100 - Insurance brokerage services
- 66514110 - Motor vehicle insurance services
- 66513200 - Contractor's all-risk insurance services
- 66515100 - Fire insurance services
- 66516400 - General liability insurance services
- 66516000 - Liability insurance services

- 66515000 - Damage or loss insurance services
- 66513100 - Legal expenses insurance services
- 66516500 - Professional liability insurance services
- 66516100 - Motor vehicle liability insurance services
- 66517300 - Risk management insurance services

### **II.2.3) Place of performance**

NUTS codes

- UK - UNITED KINGDOM

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

A programme of General (non-life) insurance and related services for Swaythling Housing Society trading as Abri, excluding insurance types and risks as described under Lots 2, 3, 4 and 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.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

Swaythling Housing Society trading as Abri 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

Swaythling Housing Society trading as Abri 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

## **II.2) Description**

### **II.2.1) Title**

Motor: 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
- 66518000 - Insurance brokerage and agency services
- 66518100 - Insurance brokerage services
- 66518200 - Insurance agency services
- 66515000 - Damage or loss insurance services
- 66516100 - Motor vehicle liability insurance services
- 66510000 - Insurance services
- 66518300 - Insurance claims adjustment services

### **II.2.3) Place of performance**

NUTS codes

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

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

The Swaythling Housing Society trading as Abri 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

The Swaythling Housing Society trading as Abri 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

# **II.2) Description**

## **II.2.1) Title**

Cyber: Insurance and related services associated with Cyber risks for Swaythling Housing Society trading as Abri

Lot No

3

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

- 66510000 - Insurance services
- 66518000 - Insurance brokerage and agency services
- 66000000 - Financial and insurance services
- 66518100 - Insurance brokerage services
- 66518200 - Insurance agency services
- 66517300 - Risk management insurance services
- 66515000 - Damage or loss insurance services

### **II.2.3) Place of performance**

NUTS codes

- UK - UNITED KINGDOM

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

Insurance and related services associated with Cyber risks for Swaythling Housing Society trading as Abri

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

Swaythling Housing Society trading as Abri 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 (or 2 periods of insurance), 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

The Swaythling Housing Society trading as Abri 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 (or 2 periods of insurance), 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

### **II.2) Description**

#### **II.2.1) Title**

Terrorism: Insurance and related services associated with Terrorism Risks for Swaythling Housing Society trading as Abri

Lot No

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

- 66510000 - Insurance services
- 66518000 - Insurance brokerage and agency services
- 66000000 - Financial and insurance services
- 66518100 - Insurance brokerage services
- 66518200 - Insurance agency services
- 66517300 - Risk management insurance services
- 66515000 - Damage or loss insurance services
- 66515410 - Financial loss insurance services

## **II.2.3) Place of performance**

NUTS codes

- UK - UNITED KINGDOM

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

Insurance and related services associated with Terrorism risks for the Swaythling Housing Society trading as Abri

## **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

The Swaythling Housing Society trading as Abri 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 (or 2 periods of insurance), 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

The Swaythling Housing Society trading as Abri 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

### **II.2) Description**

#### **II.2.1) Title**

Directors and Officers: Insurance and related services associated with Directors and Officers' Liability

Lot No

5

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

- 66510000 - Insurance services
- 66518000 - Insurance brokerage and agency services
- 66000000 - Financial and insurance services
- 66518100 - Insurance brokerage services
- 66518200 - Insurance agency services
- 66516000 - Liability insurance services
- 66516500 - Professional liability insurance services
- 66518300 - Insurance claims adjustment services
- 66517300 - Risk management insurance services

#### **II.2.3) Place of performance**

NUTS codes

- UK - UNITED KINGDOM

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

Insurance and related services associated with Excess Directors and Officers' Liability risks for the Swaythling Housing Society trading as Abri

## **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

Swaythling Housing Society trading as Abri 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 (or 2 periods of insurance), 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

Swaythling Housing Society trading as Abri 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

## **II.2) Description**

### **II.2.1) Title**

All Lots: Insurance and related services associated with Swaythling Housing Society trading as Abri

Lot No

6

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

- 66510000 - Insurance services
- 66515200 - Property insurance services
- 66515411 - Pecuniary loss insurance services
- 66000000 - Financial and insurance services
- 66515100 - Fire insurance services

- 66514110 - Motor vehicle insurance services
- 66512100 - Accident insurance services
- 66514100 - Insurance related to Transport
- 66513000 - Legal insurance and all-risk insurance services
- 66518200 - Insurance agency services
- 66516000 - Liability insurance services
- 66518000 - Insurance brokerage and agency services
- 66515000 - Damage or loss insurance services
- 66518100 - Insurance brokerage services
- 66516500 - Professional liability insurance services
- 66516400 - General liability insurance services
- 66516100 - Motor vehicle liability insurance services
- 66518300 - Insurance claims adjustment services
- 66517300 - Risk management insurance services

### **II.2.3) Place of performance**

NUTS codes

- UK - UNITED KINGDOM

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

A programme of General insurance and related services for Swaythling Housing Society trading as Abri, Including Motor fleet risks, Engineering insurance/inspection, Cyber, Terrorism, Directors and Officers Liability. 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, employment practices liability, cyber and terrorism. This lot is a combination of lots 1,2,3,4 and 5

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

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

Start date

1 July 2021

End date

30 June 2024

This contract is subject to renewal

Yes

Description of renewals

The Swaythling Housing Society trading as Abri 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.2.9) 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 at SQ stage for each Lot 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

Swaythling Housing Society trading as Abri 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**

<https://in-tendhost.co.uk/radian/aspx/Home>

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## **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

#### **III.1.3) Technical and professional ability**

List and brief description of selection criteria

Selection criteria as stated in the procurement documents. The tender documents will require providers to detail their relevant professional experience, resource, skills, qualifications and quality control practices.

#### **III.1.5) Information about reserved contract**

The contract is reserved to sheltered workshops and economic operators aiming at the social and professional integration of disabled or disadvantaged persons

The execution of the contract is restricted to the framework of sheltered employment programmes

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## Section IV. Procedure

### IV.1) Description

#### IV.1.1) Type of procedure

Competitive procedure with negotiation

#### 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: Yes

### IV.2) Administrative information

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

Date

15 February 2021

Local time

5:00pm

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

8 March 2021

#### IV.2.4) Languages in which tenders or requests to participate may be submitted

English

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## **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.

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

The High Court of England and Wales

London, United Kingdom

Telephone

+44 1959562242

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**

The Cabinet Office

Eastleigh

Telephone

+44 1959562242

Country

United Kingdom