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Tender

Provision of Insurance and related services to Coastal Housing Group Ltd and Pennant Housing Association Ltd

Coastal Housing Group

F02: Contract notice

Notice identifier: 2023/S 000-001927

Procurement identifier (OCID): ocds-h6vhtk-039984

Published 20 January 2023, 7:05pm

Section I: Contracting authority

I.1) Name and addresses

Coastal Housing Group

3rd Floor, 220 High Street, SA1 1NW

swansea

SA1 1NW

Contact

Our Consultant for this project is Gibbs Laidler Consulting LLP

Email

jeremy.flint@gibbslaidler.co.uk

Telephone

+44 1959562242

Country

United Kingdom

Region code

UK - United Kingdom

Internet address(es)

Main address

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

I.3) Communication

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

<https://www.delta-esourcing.com/respond/F9HRK9J65G>

Additional information can be obtained from the above-mentioned address

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

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Provision of Insurance and related services to Coastal Housing Group Ltd and Pennant Housing Association Ltd

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 Coastal Housing Group and Pennant Housing Association

II.1.5) Estimated total value

Value excluding VAT: £1,500,000

II.1.6) Information about lots

This contract is divided into lots: Yes

Tenders may be submitted for maximum number of lots

4

Maximum number of lots that may be awarded to one tenderer: 4

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

Lots 1 to 4 will be individually evaluated and multiple awards may result. Where the potential supplier is an insurance Broker, it may choose to place the insurance(s) required within each Lot with different insurers at its 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 Coastal Housing Group and Pennant Housing Association

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
- 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 codes

- 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 Coastal Housing Group and Pennant Housing Association. 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. This list is to be decided at the sole discretion of Coastal Housing Group. This Lot excludes: Motor (see Lot 2), Engineering (see Lot 3) and Terrorism (see Lot 4).

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

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

Start date

7 July 2023

End date

6 July 2028

This contract is subject to renewal

Yes

Description of renewals

Coastal Housing Group will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for an initial period of 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 are 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

Coastal Housing Group will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for an initial period of 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

To respond to this opportunity please click here:

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 codes

- 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: £150,000

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

Start date

7 July 2023

End date

6 July 2028

This contract is subject to renewal

Yes

Description of renewals

Coastal Housing Group will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for an initial period of 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 are 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

Coastal Housing Group will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for an initial period of 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) 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 codes

- 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: £50,000

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

Start date

7 July 2023

End date

6 July 2028

This contract is subject to renewal

Yes

Description of renewals

Coastal Housing Group will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for an initial period of 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 are 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

Coastal Housing Group will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for an initial period of 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) Description

II.2.1) Title

Insurance and related services associated with Terrorism risks for Coastal Housing Group and Pennant Housing Association

Lot No

4

II.2.2) Additional CPV code(s)

- 66000000 - Financial and insurance services
- 66510000 - Insurance services
- 66515000 - Damage or loss insurance services
- 66515200 - Property insurance services
- 66515410 - Financial loss insurance services
- 66518000 - Insurance brokerage and agency services
- 66517300 - Risk management insurance services

II.2.3) Place of performance

NUTS codes

- 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 Coastal Housing Group and Pennant Housing Association.

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: £45,000

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

Start date

7 July 2023

End date

6 July 2028

This contract is subject to renewal

Yes

Description of renewals

Coastal Housing Group will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for an initial period of 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

Coastal Housing Group will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for an initial period of 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

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 relevant services provided to property owners, property developers, public sector organisations, social landlords or other similar organisations over the past 5 years, plus details of three 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-, the contracting authority 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.1.4) 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.1.8) 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

21 February 2023

Local time

5:00pm

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

24 February 2023

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: 7 July 2023

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-swansea:-Insurance-services./F9HRK9J65G>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/F9HRK9J65G>

GO Reference: GO-2023120-PRO-21956232

VI.4) Procedures for review

VI.4.1) Review body

The High Court of England and Wales

London

Country

United Kingdom