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Tender

## **Home Energy Efficiency Loan (HEEL)**

London Borough of Merton

F02: Contract notice

Notice identifier: 2023/S 000-028105

Procurement identifier (OCID): ocds-h6vhtk-04032d

Published 22 September 2023, 5:54pm

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

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

London Borough of Merton

Civic Centre, London Rd

Morden

SM4 5DX

#### **Email**

[commercial.services@merton.gov.uk](mailto:commercial.services@merton.gov.uk)

#### **Country**

United Kingdom

#### **Region code**

UKI63 - Merton, Kingston upon Thames and Sutton

#### **Internet address(es)**

Main address

<http://www.merton.gov.uk/>

Buyer's address

<http://www.merton.gov.uk/>

### **I.3) Communication**

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

<https://procontract.due-north.com/Register>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://procontract.due-north.com/Register>

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

Regional or local authority

### **I.5) Main activity**

General public services

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## **Section II: Object**

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

#### **II.1.1) Title**

Home Energy Efficiency Loan (HEEL)

Reference number

DN690969

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

- 66190000 - Loan brokerage services

### **II.1.3) Type of contract**

Services

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

The London Borough of Merton (“the Council”) is inviting tenders to an FCA registered loan administrator to operate a revolving fund at a competitive interest rate for the residents of Merton Borough in Southwest London.

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

This contract is divided into lots: No

## **II.2) Description**

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

NUTS codes

- UKI63 - Merton, Kingston upon Thames and Sutton

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

The aim of this contract is for a Financial Conduct Authority registered loan administrator to manage all aspects of a loan fund for a period of 25 years. This is on behalf of the London Borough of Merton, who are based in the Southwest of London (including the areas of Mitcham, Wimbledon and Morden).

The loan is to assist domestic property owners with the costs of completing retrofit works relating to energy efficiency and decarbonising homes in the borough. The London Borough of Merton has 86,000 homes and they contribute 44% to the local carbon footprint. In order to meet the boroughs 2050 Net Zero target, underpinned by the 2019 Climate Emergency Declaration and approval of the Climate Strategy and Action Plan the following year, these homes will need to be retrofitted to an average EPC rating of B (currently D).

The loan will be aimed at private homeowners (there are 71,000 privately owned homes, 15,000 are owned by Social Housing Providers). The loan broker is required to carry out all the processes related to administering the loan and keep in close contact with the Councils contract manager for monitoring and evaluation of this scheme.

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

Quality criterion - Name: Relevant experience / Weighting: 8

Quality criterion - Name: Advertising and promotion / Weighting: 8

Quality criterion - Name: Management of loan process / Weighting: 8

Quality criterion - Name: Performance and reporting / Weighting: 6

Quality criterion - Name: Property assessment / Weighting: 5

Quality criterion - Name: Social Value / Weighting: 5%

Price - Weighting: 60

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

Duration in months

1500

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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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

Regulated by Financial Conduct Authority

#### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

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

Selection criteria as stated in the procurement documents

## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **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

23 October 2023

Local time

2:00pm

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

English

#### **IV.2.7) Conditions for opening of tenders**

Date

23 October 2023

Local time

2:00pm

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## **Section VI. Complementary information**

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

This is a recurrent procurement: No

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

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

The Royal Courts of Justice

London

Country

United Kingdom