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Tender

## **Provision of Insurance and Related Services to SOHA Housing Ltd**

SOHA Housing Ltd

F02: Contract notice

Notice identifier: 2023/S 000-033220

Procurement identifier (OCID): ocids-h6vhtk-04172b

Published 9 November 2023, 4:05pm

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

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

SOHA Housing Ltd

Royal Scot House, 99 Station Road

Didcot

OX11 7NN

#### **Email**

[tenders@soha.co.uk](mailto:tenders@soha.co.uk)

#### **Telephone**

+44 7938738509

#### **Country**

United Kingdom

#### **Region code**

UKJ14 - Oxfordshire

**Internet address(es)**

Main address

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

**I.2) Information about joint procurement**

The contract is awarded by a central purchasing body

**I.3) Communication**

Access to the procurement documents is restricted. Further information can be obtained at

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

Additional information can be obtained from another address:

SOHA Housing Ltd

Royal Scot House, 99 Station Road

Didcot

OX11 7NN

**Email**

[tenders@soha.co.uk](mailto:tenders@soha.co.uk)

**Country**

United Kingdom

**Region code**

UKJ14 - Oxfordshire

**Internet address(es)**

Main address

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

Tenders or requests to participate must be submitted electronically via

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

Tenders or requests to participate must be submitted to the following address:

SOHA Housing Ltd

Royal Scot House, 99 Station Road

Didcot

OX11 7NN

**Email**

[tenders@soha.co.uk](mailto:tenders@soha.co.uk)

**Country**

United Kingdom

**Region code**

UKJ14 - Oxfordshire

**Internet address(es)**

Main address

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

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

Other type

Housing Association

**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 SOHA Housing Ltd

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

- 66510000 - Insurance services

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

Services

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

Property, liability and other specific insurances as required by SOHA Housing Ltd and amended from time to time to meet their requirements and respond to any change to the risk profile and appetite.

Insurance Broking Services are not required. Respondents will be required to work with our Broker, Gallagher, who will have responsibility for management of the insurances placed.

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

Value excluding VAT: £555,560

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

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

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

Property Stock including Property Owners Liability

Lot No

1

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

- 66515200 - Property insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Property & related Business Interruption risks (including Terrorism) and Property Owners Liability (POL) and related services as required by the contracting Authority for property damage, business interruption and POL risks associated with social rented homes, leasehold and shared ownership property, care homes, residential extra-care homes, commercial property and the like all owned or managed by the Contracting Authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

#### **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

#### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

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

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

Excess Property Owners Liability

Lot No

2

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Excess Property Owners Liability and related services as required by the Contracting Authority

#### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Employers, Public, Products Liability

Lot No

3

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

- 66516000 - Liability insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Employers, Public, Products Liability risks and related services for Employers, Public & Products liability as required by the Contracting Authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual

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

Variants will be accepted: Yes

### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
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## **II.2) Description**

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

Excess Liability

Lot No

4

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

- 66516000 - Liability insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Excess Liability and related services as required by the Contracting Authority

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

#### **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

#### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
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### **II.2) Description**

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

Office Combined

Lot No

5

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Commercial Combined / Business / Office risks (including Terrorism) and related services for Commercial Combined (office type risks), including office buildings, tenants improvements, rent receivable, contents, equipment, depot sites, business interruption, all risks, money, PA assault and other risks as required by the Contracting Authority.

#### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

#### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Computer

Lot No

6

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Computer related risks (including Terrorism) and related services for physical loss or damage to computer hardware, software and related business interruption risks as required by the contracting authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

#### **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

#### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

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

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

Crime

Lot No

7

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Crime including Fidelity Guarantee and any related services as required by the contracting authority

#### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

#### **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

#### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Contractors All Risks

Lot No

8

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

- 66513200 - Contractor's all-risk insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Contractors All Risks and any related services as required by the Contracting Authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Directors & Officers Liability

Lot No

9

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Directors and Officers Liability and any related services as required by the Contracting Authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Professional Indemnity

Lot No

10

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Professional Indemnity and any related services as required by the contracting authority

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

### **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

### **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Cyber Liability

Lot No

11

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

- 66510000 - Insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Insurance for Cyber Liability and any related services as required by the contracting authority

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

## **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

## **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

## **II.2) Description**

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

Engineering

Lot No

12

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

- 66519000 - Engineering, auxiliary, average, loss, actuarial and salvage insurance services

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

NUTS codes

- UKJ14 - Oxfordshire

Main site or place of performance

Oxfordshire

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

Engineering Inspection and related services as required by the Contracting Authority.

### **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 February 2024

This contract is subject to renewal

Yes

Description of renewals

Annual.

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

Variants will be accepted: Yes

### **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

## **II.2.14) Additional information**

All communication relating to this tender must be directed to:  
[uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk)

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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

Insurers authorised under the Financial Services Act 2012 and regulated by the Financial Conduct Authority or an insurance company authorised in another member state and the European Economic Area. Potential suppliers may be requested to provide a summary and overview of services provided to the social housing sector over the past 3 years and details of up to 10 clients receiving similar services.

Insurance Broking Services are not required. Respondents will be required to work with our Broker, Gallagher, who will have responsibility for management of the insurances placed.

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

List and brief description of selection criteria

Bidders must be authorised by the FCA or EU equivalent to carry out business in the relevant classes of insurance as listed under the contract notice and be compliant with any requirements set out by each authority.

Minimum level(s) of standards possibly required

Bidders are expected to be Standard & Poor's (or equivalent agency A M Best or Moody's) rated A- or better.

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

Selection criteria as stated in the procurement documents

### **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

Insurers authorised under the Financial Services Act 2012 and regulated by the Financial Conduct Authority or an insurance company authorised in another member state of the European Union.

### **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

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## **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

18 December 2023

Local time

5:00pm

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

English

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

Date

19 December 2023

Local time

9:00am

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## **Section VI. Complementary information**

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

This is a recurrent procurement: No

### **VI.3) Additional information**

Expressions of interest are to be sent to: [tenders@soha.co.uk](mailto:tenders@soha.co.uk) and [uk.gallagherhousing.tenders@ag.com](mailto:uk.gallagherhousing.tenders@ag.com). When expressing interest please state which lot(s) you will be bidding for.

Clarification questions are to be sent to: [uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com)

Tender Submissions must be returned to: [uk.gallagherhousing.tenders@ajg.com](mailto:uk.gallagherhousing.tenders@ajg.com) and [tenders@soha.co.uk](mailto:tenders@soha.co.uk).

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=811570311>

GO Reference: GO-2023119-PRO-24374523

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

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

The High Court of England and Wales

London

Country

United Kingdom