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Tender

## **Provision of Insurance and related services to South Lakes Housing**

South Lakes Housing

F02: Contract notice

Notice identifier: 2022/S 000-035444

Procurement identifier (OCID): ocds-h6vhtk-038d94

Published 14 December 2022, 7:05pm

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

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

South Lakes Housing

Bridge Mills Business Centre,, Stramongate,

Kendal

LA9 4BD

#### **Contact**

John Mansergh Director of Business Improvement

#### **Email**

[j.mansergh@southlakeshousing.co.uk](mailto:j.mansergh@southlakeshousing.co.uk)

#### **Telephone**

+44 1539717706

#### **Country**

United Kingdom

**Region code**

UK - United Kingdom

**Internet address(es)**

Main address

[www.southlakeshousing.co.uk](http://www.southlakeshousing.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/tenders/UK-UK-Kendal:-Insurance-services./9F7Y9754RC>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.delta-esourcing.com/tenders/UK-title/9F7Y9754RC>

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 South Lakes Housing

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

- 66510000 - Insurance services

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

Services

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

Property Owners Combined including Property Stock, Office and Depot Buildings, Business Interruption, Money, Employers Liability, Public/Products Liability, Property Owners Liability and terrorism excluding broker services

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

Value excluding VAT: £3,000,000

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

This contract is divided into lots: No

## **II.2) Description**

### **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
- 66515200 - Property insurance services
- 66515410 - Financial loss insurance services
- 66515411 - Pecuniary 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
- 66519200 - Engineering 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**

A programme of General (non-life) insurance and related services for South Lakes Housing. The programme will require Insurance and related services for risks for Property Owners Combined only including property damage and business interruption, employers liability, public/products liability, property owners liability, business combined/office, money, all risks and terrorism excluding broker services. Responses are required for all covers and contract will be awarded as one (not individual classes) to the winning bidder.

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

Quality criterion - Name: Quality as more fully defined in the ITT / Weighting: 40

Cost criterion - Name: Price / Weighting: 60

### **II.2.6) Estimated value**

Value excluding VAT: £3,000,000

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

Start date

1 April 2023

End date

31 March 2026

This contract is subject to renewal

Yes

Description of renewals

South Lakes Housing will consider entering into Long term agreements with the 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 years and further 2 years subject to satisfactory service, performance and cost.

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

Variants will be accepted: No

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

Options: Yes

Description of options

This will be Open Procedure and bidders will be required to submit satisfactorily completed selection questionnaire with their tender response. Bidders failing to meet certain required standards set out in the selection questionnaire will be rejected.

South Lakes Housing will consider entering into Long term agreements with the 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 years and further 2 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**

For more information about this opportunity, please visit the Delta eSourcing portal at: <https://www.delta-esourcing.com/tenders/UK-UK-Arundel:-Insurance-services./9F7Y9754RC>

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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 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 insurance programme, including 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 Marsh'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 Marsh's market security committee's latest report, including written recommendation from Marsh's market security committee.

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

List and brief description of selection criteria

The tender documents will require Insurers 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.

### **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**

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 January 2023

Local time

5:00pm

#### **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 March 2023

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

Date

24 January 2023

Local time

9:00am

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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. All tender documents and any additional information will be available to access and download at <https://www.delta-esourcing.com/tenders/UK-UK-Kendal:-Insurance-services./9F7Y9754RC>.

To be managed and administered by Marsh as the contracting Association's appointed insurance broker and advisor.

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=734689327>

GO Reference: GO-20221214-PRO-21736329

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

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

The High Court of England and Wales

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.4.4) Service from which information about the review procedure may be obtained**

The Cabinet Office

London

Country

United Kingdom