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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

Telephone

+44 1539717706

Country

United Kingdom

Region code

UK - United Kingdom

Internet address(es)

Main address

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

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>

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

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