



Crown
Commercial
Service

**CALL OFF ORDER FORM FOR MORTGAGES RESEARCH
SERVICES TO**

HM TREASURY

FROM

OLIVER WYMAN LTD

CONTRACT REFERENCE CCCC20C06

FRAMEWORK SCHEDULE 4

CALL OFF ORDER FORM

PART 1 – CALL OFF ORDER FORM

SECTION A

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreement for the provision of **Management Consultancy Services Two (MCF2)** dated 4th September 2018.

The Supplier agrees to supply the Services specified below on and subject to the terms of this Call Off Contract.

For the avoidance of doubt, this Call Off Contract consists of the terms set out in this Template Call Off Order Form and the Call Off Terms.

Order Number	To be completed post contract award
From Customer	HM Treasury
To Supplier	Oliver Wyman Ltd
Date	22 nd December 2020

SECTION B

1. CALL OFF CONTRACT PERIOD

1.1.	The Contract is deemed to have commenced on 22 nd December 2020
1.2.	Expiry Date: 12 th February 2021. It is expected that the work will be completed within 7 weeks.

2. SERVICES

2.1.	Services required: See Annex A – Statement of Requirements.
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3. PROJECT PLAN

Redacted

4. CONTRACT PERFORMANCE

4.1.	Standards: In Clause 11 of the Call-Off terms			
4.2	Service Levels/Service Credits: Not applied			
4.3	Critical Service Level Failure: Not applied			
4.4	Performance Monitoring:			
	KPI/SLA	Service Area	KPI/SLA description	Target
	1	Availability	All telephone email or postal enquiries for the Customer are to be fully answered within 5 working days of receipt	100%
	2	Complaints Handling	Any issues raised by the Customer to be acknowledged within 2 working days of receipt.	100%
	3	Contract Management	Supplier to attend review meetings as arranged with the Customer	100%
4.5	Period for providing Rectification Plan: Not Applied			

5. PERSONNEL

5.1	Key Personnel: Redacted
5.2	Relevant Convictions: In Clause 28.2 of the Call Off terms

6. PAYMENT

6.1	Call Off Contract Charges (including any applicable discount(s), but excluding VAT): Redacted For the avoidance of doubt, the total contract value shall not exceed £177,410 Ext Vat. These rates are to remain firm for the duration of the contract agreed by HMT and Oliver Wyman Ltd directly.
6.2	Payment terms/profile Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables. Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and associated costs. Invoices should be submitted to: Redacted
6.3	Reimbursable Expenses: Not permitted
6.4	Customer billing address Invoices should be submitted to: Redacted 1 Horse Guards Road London SW1A 2HQ
6.5	Call Off Contract Charges fixed for Call Off Contract fixed for the full term of the contract
6.6	Supplier periodic assessment of Call Off Contract Charges Not applied
6.7	Supplier request for increase in the Call Off Contract Charges Not permitted

7. LIABILITY AND INSURANCE

7.1	Estimated Year 1 Call Off Contract Charges £177,410 Exc. VAT
7.2	Supplier's limitation of Liability Clause 37.2.1 of the Call Off Terms
7.3	Insurance Clause 38.3 of the Call Off Terms

8. TERMINATION AND EXIT

8.1	Termination on material Default Clause 42.2 of the Call Off Terms
8.2	Termination without cause notice period In Clause 42.7 of the Call Off Terms
8.3	Undisputed Sums Limit: In Clause 43.1.1 of the Call Off Terms
8.4	Exit Management: Not applied

9. SUPPLIER INFORMATION

9.1	Supplier's inspection of Sites, Customer Property and Customer Assets: Not Applied
9.2	Commercially Sensitive Information: Not Applied

10. OTHER CALL OFF REQUIREMENTS

10.1	Recitals (in preamble to the Call Off Terms): Recital A
10.2	Call Off Guarantee (Clause 4 of the Call Off Terms): Not required

10.3	Security: Short form security requirements
10.4	ICT Policy: Not applied
10.5	Business Continuity & Disaster Recovery: Not applied Disaster Period: Not Applicable
10.6	Protection of Customer Data In clause 35.2.3 of the Call Off Terms
10.7	Notices (Clause 56.6 of the Call Off Terms) Customer's postal address: 1 Horse Guards Road London SW1A 2HQ Supplier's postal address: Oliver Wyman Ltd, 55 Baker Street London W1U 7EU England
10.8	Transparency Reports Not Applied
10.9	Alternative and/or Additional Clauses from Call Off Schedule 14 and if required, any Customer alternative pricing mechanism: Not Applied
10.10	Call Off Tender: Redacted
10.11	Publicity and Branding In clause 36.3.2 of the Call Off Terms
10.12	Staff Transfer Annex to Schedule 10, List of Notified Sub-Contractors (Call Off Tender).
10.13	Processing Data Call Off Schedule 17

	Contract Reference:	CCCC20C06	
	Date:	22 nd December 2020	
	Description Of Authorised Processing	Details	
	Identity of the Controller and Processor	The Parties acknowledge that for the purposes of the Data Protection Legislation the Customer is the Data Controller and the Supplier is the Data Processor under this Framework Agreement to the extent that there is any processing by the Processor.	
	Use of Personal Data (if any)	Managing the obligations under the Call Off Contract Agreement, including exit management, and other associated activities,	
	Duration of the processing (if any)	For the duration of the Framework Contract plus 7 years.	
	Types of Personal Data	<p>There is no intention for the Supplier to process any Personal Data in connection with the Services. To the extent there is any processing by the Supplier as Data Processor, the type of Personal Data the Supplier could process includes the following:</p> <p>Full name</p> <p>Workplace address</p> <p>Workplace Phone Number</p> <p>Workplace email address</p> <p>Names</p> <p>Job Title</p> <p>Compensation</p> <p>Tenure Information</p> <p>Qualifications or Certifications</p>	

		<p>Nationality</p> <p>Education & training history</p> <p>Previous work history</p> <p>Personal Interests</p> <p>References and referee details</p> <p>Driving license details</p> <p>National insurance number</p> <p>Bank statements</p> <p>Utility bills</p> <p>Job title or role</p> <p>Job application details</p> <p>Start date</p> <p>End date & reason for termination</p> <p>Contract type</p> <p>Compensation data</p> <p>Photographic Facial Image</p> <p>Biometric data</p> <p>Birth certificates</p> <p>IP Address</p> <p>Details of physical and psychological health or medical condition</p> <p>Next of kin & emergency contact details</p>	
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		Record of absence, time tracking & annual leave	
10.14	MOD DEFCONs and DEFFORM Not Applied		

FORMATION OF CALL OFF CONTRACT

By signing and returning this call off order form (which may be done by electronic means), the Supplier agrees to enter a Call Off Contract with the Customer to provide the Services in accordance with the terms Call Off Order Form and the Call Off Terms.

The Parties hereby acknowledge and agree that they have read the Call Off Order Form and the Call Off Terms and by signing below agree to be bound by this Call Off Contract.

In accordance with paragraph 7 of Framework Schedule 5 (Call Off Procedure), the Parties hereby acknowledge and agree that this Call Off Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of the Call Off Order Form from the Supplier within two (2) Working Days from such receipt.

For and on behalf of the Supplier:

Name and Title	Redacted
Signature	Redacted
Date	05 / 02 / 2021

For and on behalf of the Customer:

Name and Title	Redacted
Signature	Redacted
Date	05 / 02/ 2021

Annex A – Statement Of Requirements

1. PURPOSE

- 1.1. The Customer requires analysis to consider the case for long term fixed rate mortgages as an addition to the UK housing market. This should look at what factors affect the ability of first time buyers (FTBS) to access mortgage finance, how this has changed over time, and any challenges created by the current crisis.

2. DEFINITIONS

Expression or Acronym	Definition
LTFRM	Long Term Fixed Rate Mortgages
FTB	First Time Buyer
MCF2	Management Consultancy Framework 2
LTV	Loan to Value
MHCLG	Ministry for Housing, Communities and Local Government

3. SCOPE OF REQUIREMENT

- 3.1 Redacted

4. THE REQUIREMENT

- 4.1. Redacted

5. KEY MILESTONES AND DELIVERABLES

- 5.1. Redacted

6. MANAGEMENT INFORMATION/REPORTING

- 6.1. Redacted

7. VOLUMES

- 7.1. Redacted

8. CONTINUOUS IMPROVEMENT

- 8.1. The Supplier will be expected to continually improve the way in which the required services are to be delivered throughout the contract duration.
- 8.2. This is a 7 week term contract which will have short term engagement

9. QUALITY

- 9.1. Redacted

10. STAFF AND CUSTOMER SERVICE

- 10.1. The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.
- 10.2. The Supplier's staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.
- 10.3. The Supplier shall ensure that staff understand the Customer vision and objectives and will provide excellent customer service to the Customer throughout the duration of the Contract.

11. SERVICE LEVELS AND PERFORMANCE

11.1. Redacted

11.2. The Customer requires the following;

KPI/SLA	Service Area	KPI/SLA description	Target
1	Availability	All telephone email or postal enquiries for the Customer are to be fully answered within 5 working days of receipt	100%
2	Complaints Handling	Any issues raised by the Customer to be acknowledged within 2 working days of receipt.	100%
3	Contract Management	Supplier to attend review meetings as arranged with the Customer	100%

12. SECURITY AND CONFIDENTIALITY REQUIREMENTS

12.1. None required beyond the standard MCF2 protections

13. PAYMENT AND INVOICING

- 13.1. Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.
- 13.2. Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.
- 13.3. Invoices should be submitted to: Redacted

14. CONTRACT MANAGEMENT

- 14.1. Supplier and the Customer will meet remotely weekly to discuss progress.

- 14.2. Attendance at Contract Review meetings if not remote, shall be at the Supplier's own expense.