

OFFICIAL-SENSITIVE (COMMERCIAL)

HM REVENUE & CUSTOMS SERVICE ORDER SOCIAL AND ECONOMIC RESEARCH FRAMEWORK AGREEMENT
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1. HMRC Information	
Purchase Order to be issued under separate cover	
Project Information	LOT: 12 Project Reference: 16-17.EC.09
Purchase / Limit Order No:	8500005388
HMRC – Social and Economic Research Framework – Commercial Contact	
Name:	Stuart Bishop
Contact Tel No:	03000 587 851
Email:	stuart.bishop@hmrc.gsi.gov.uk
HMRC Budget Manager & invoice enquiries	
Name:	Mike Crumpton
Contact Tel. No:	03000 515 268
Email:	mike.crumpton@hmrc.gsi.gov.uk
HMRC – Invoice payment	
<i>All invoices should be sent to the HMRC Invoice Processing Centre</i>	
Address:	HMRC Invoice Processing Centre PO Box 2092, J Spur, Barrington Road Worthing, BN12 9AN
Contact Tel No:	01903 509224
Email:	payments.team@hmrc.gsi.gov.uk
HMRC – Budget Authorising Officer	
Name:	Brian O’Callaghan
Contact Tel No:	03000 589 686
Email:	brian.o’callaghan@hmrc.gsi.gov.uk
HMRC Project Manager	
Name:	Sarah Jennings
Contact Tel No:	03000 566272
Email:	Sarah.jennings2@hmrc.gsi.gov.uk

2. Contractor Information	
Vendor (Supplier):	Kantar Public
Contact:	Gill Zubricki
Contact Tel No:	+44 (0)20 8967 4153
Contact Address:	Accounts Receivable Supervisor, Ealing Gateway, 26 – 30 Uxbridge Road, Ealing W5 2AU
Email:	Gill.Zubricki@kantarc.com
Consultant / Key Personnel:	Kelsey Beninger; Alice Coulter

3. Contractual Detail	
Contract Ref: Incl. Framework name e.g. Catalyst, and relevant section. Also include URN for Catalyst and Cipher call offs.	<p>DWP Social and Economic Research Framework 2013</p> <p>This Service Order is subject to the DWP Social and Economic Research Framework (2013) Terms and Conditions of contract and Clause D3 and D4 relating to the Official Secrets Acts and related Legislation, and</p>

OFFICIAL-SENSITIVE (COMMERCIAL)

Special Terms and Conditions: e.g. overtime, expenses, travel & subsistence, notice period.	Confidentiality, as detailed in Annex B – additional contractual information.
	HMRC will review its position after each of the milestones detailed in the specification on an ongoing basis and reserves the right to terminate the contract (for any reason) prematurely. For the purpose of this engagement the notice period will be 1 month.

4. Project Information	
Project Title:	Understanding customers with offshore assets and what drives them to bring their tax affairs up to date
Start Date:	31/10/2016
End Date:	31/03/2017

5. Payment Schedule			
#	Milestone	Anticipated delivery date*	Total charge (excluding VAT) (£)
1	Delivery of literature review; recruitment and fieldwork materials	07/12/2016	[redacted under section 41 of the Freedom of Information act]
2	Delivery of 30 face-to-face interviews	01/02/2016	
3	Delivery of all outputs	23/03/2016	
4			
* - The anticipated delivery date is not a fixed invoice point. Payment is made upon satisfactory receipt of services, certified by the Project Manager.		Grand Total (£) exclusive of VAT:	48,518

Invoices relating to this Service Order should be sent to the HMRC Invoice Processing Centre (provided at 1. above) by email in pdf format, unless otherwise indicated. All invoices must quote the Purchase Order Number.

Invoices received without a Purchase Order number may be rejected.

6. Summary of Requirements / Role Description / Deliverables
The section below should be used to provide clear summary of the requirements for delivery of the project/assignment. It should include, where appropriate, milestones / key deliverables with dates, and any proposals for skills transfer (where relevant).
<p>Summary of Requirements</p> HMRC's specification of requirements are as follows: Delivery of the project <i>Understanding customers with offshore assets and what drives them to bring their tax affairs up to date</i> by the timetabled completion date of 23/03/2017. Requirements are set out in the Invitation to Tender (issued by HMRC 19/08/2016),

subject to the following clarifications:

- HMRC will not provide a sample of customers for the research, recruitment will be conducted by agents after HMRC liaises with agents and they will feed sample data directly to Kantar Public
- Due to the sample change, if more than 3 interviews need to be conducted outside of London and the South East (based on sample provided by agents) and with HMRC agreement, these interviews may be carried out over the phone, due to additional costs required for travel to conduct potentially one interview in a day outside of London.
- Additional outputs to include a 5 page literature review prior to fieldwork start; 2 anonymised transcripts from the first five interviews conducted; and pen portraits and customer journey maps to be provided for each interview achieved.



19 Aug 16 ITT
Offshore customers.

Summary of supplier's proposal

Services will be provided by Kantar Public (formerly TNS BMRB) as set out in their tender dated 12/09/2016 (**this document was redacted under section 41 of the Freedom of Information Act**) subject to the following clarifications:

- Additional costs to reflect inefficiencies caused by the change to sample provision and for the additional outputs requested, as set out in the document 'Summary of revised approach and associated costs – Version 2' (**this document was redacted under section 41 of the Freedom of Information Act**).

Deliverables and payment milestones

Payment Milestone 1 - **[redacted under section 41 of the Freedom of Information act]**

Payable upon satisfactory receipt of the following deliverables, anticipated milestone date: 07/12/2016.

[redacted under section 41 of the Freedom of Information act]

Payment Milestone 2 - **[redacted under section 41 of the Freedom of Information act]**

Payable upon satisfactory receipt of the following deliverables, anticipated milestone date: 01/02/2016.

- Delivery of 30 face-to-face interviews. If 30 interviews are not achieved, subtractions of **[redacted under section 41 of the Freedom of Information act]** per missing interview will be made from this milestone.

[redacted under section 41 of the Freedom of Information act]

Payment Milestone 3 - **[redacted under section 41 of the Freedom of Information act]**

Payable upon satisfactory receipt of the following deliverables, anticipated milestone date: 23/03/2016.

[redacted under section 41 of the Freedom of Information act]

Any subsequent amendments or clarifications to the original response are to be delivered as agreed with the HMRC Project Leader or her nominated representative.

7. Confidential Information

As part of the Government's Transparency Agenda, this agreement and any associated

OFFICIAL-SENSITIVE (COMMERCIAL)

winning tender may be published. The contractor **must** notify the project manager (provided at 1. above) of any commercially sensitive information to be considered for redaction prior to publication.

(7.1) The following information shall be deemed Commercially Sensitive Information or Confidential Information:-

All content (Sections 1.2 – 4.2, and the appendix) is commercially sensitive apart from the outline of the research context (Section 1.1).

(7.2) Duration that the information shall be deemed Commercially Sensitive Information or Confidential Information:-

2 years

BY SIGNING AND RETURNING THIS ORDER FORM THE PROVIDER AGREES to enter a legally binding contract with the Authority to provide the Service specified in this Order Form together with, where completed and applicable, the mini-competition order (additional requirements) set out in section 3 of this Order Form. Incorporating the rights and obligations in the Call-Off Terms and Conditions set out in the Framework Agreement entered into by the Provider and the Authority on 1st July 2013 and any subsequent signed variations to the terms and conditions.

For and on behalf of the Provider:-

Name	Alice Coulter
Capacity	Director
Signature	
Date	02.11.16

For and on behalf of the HMRC:-

Name	Brian O'Callaghan
Capacity	Head of Research
Signature	
Date	17 November 2016