

# Contact Centre as a Service (CCaaS)

## Project Overview

*January – Briefing Notice - revised*



HM Revenue  
& Customs



# Pack Overview

The material included in this document focuses on the upcoming procurement of HMRC’s Contact Centre as a Service (CCaaS) solution.

The purpose of this document:

- 1

To communicate the high-level **business context**, **objectives** and **expectations** to suppliers in the market
- 2

To share the proposed **commercial approach**, expected limitations and high-level participation criteria for future market engagement events

Document Structure:

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# 1.1 Strategic context

HMRC has one of the largest customer services functions in the UK, servicing 36 million citizens and 5 million businesses. Customer contacts are delivered by multiple business groups across HMRC, including the Customer Services Group (CSG), Customer Compliance Group (CCG), Borders & Trade (B&T), and the Valuation Office Agency (VOA). As one of UK's largest contact centers by agent volume (16,000+), the Customer Services Group (CSG) drive the majority of customer contacts for HMRC.

## Strategic Objectives



Collect the right tax and pay out the right financial support



Make it easy to get tax right and hard to bend or break the rules



Maintain taxpayers' consent through fair treatment and protect society from harm



Make HMRC a great place to work



Support wider government economic aims through a resilient agile tax administration system

## Key customer contact commitments from Outcome Delivery Plan 24/25

85%

Telephony advisor attempts handled

80%

Customer satisfaction (CSAT) with digital, webchat and phone services

## Programme Scope

The focus of this programme is to **implement a consolidated CCaaS solution** to simplify the technology landscape and support key customer contact commitments.

It does not cover components which will fall under the longer-term enterprise CRM solution but will ensure alignment of strategic direction and dependencies.

# 1.2 Customer Contact Service Vision

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## Our approach

HMRC is on a journey to be a trusted, modern tax and customs department, providing a seamless customer experience and operating in a way that is recognised as fair. We're focused on making the tax system simpler, improving guidance and operational communications, and enhancing and expanding our online services to give customers quick and easy ways to manage their tax affairs by self-serving. As the overall number of customers in the tax system, and the number of them with complex needs, increases, it's even more important that we make these changes so that the maximum number of customers can self-serve their needs online and our customer service advisers can focus on helping those customers who need our help.

## Delivering for customers

We will help customers to resolve issues quickly, easily and conveniently using our online services, and support them to feel more confident using them. We are introducing new technologies that allow customers to move seamlessly from app to online and re-designing policies and services to drive customers to online channels first.

## Resilience of our systems

We run a vast 24/7 operation, and we have one of the largest and most complex IT estates in the UK. Updating it to keep pace with changing technology and to ensure it remains fit for the future is a continuous process. Our focus is on addressing any vulnerabilities and modernising our IT estate, and increasing the stability, security and overall efficiency of our IT systems, services and platforms for our customers and colleagues.

**CCaaS technology** is part of the strategic architecture design, and will enable:

1. Personalised, intuitive customer experiences through omnichannel excellence
2. Empowered front-office teams with integrated tools and real-time knowledge
3. Efficient operations supported by data-driven insights, infrastructure and performance management
4. Seamless integration with wider business systems, in particular ERP and CRM
5. Improved quality of customer service e.g. first time contact resolution and decreased wait times

## 2.2 Target Capability Overview

The intention is to move towards a consolidated CCaaS solution in order to drive the following outcomes:



### Enhanced scalability

Through a unified, cloud-based platform offering a range of synchronous and asynchronous channels to optimise the way customers can contact HMRC, delivering omnichannel excellence with out-of-the-box, native capabilities.



### Continued contact centre resilience

The ability to handle surges in contact volume, system failures, or other disruptions. With high uptime and consistently maintained service, the solution should offer flexibility to adapt to demand without disruption to existing systems.



### Enhanced self-service capabilities

A solution that enables the evolution of self-service capabilities over time, using advanced analytics and AI tools to support customers while delivering proactive, empathetic experiences. Ensuring that customer experience and data security remains the priority.



### Ease of use for advisors

A secure, resilient and reliable solution offering integrated operational management capabilities, including workforce engagement and quality management, to enhance ease of use for advisors.

# 3.1 Commercial Scope

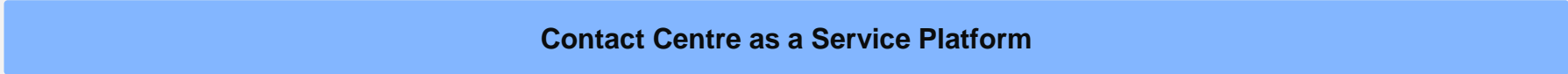
HMRC are seeking a System Integrator (SI) to lead and support a range of activities, emphasising a **collaborative and partnership-driven approach**, working alongside HMRC while demonstrating **flexibility to adapt as needs evolve**. The platform vendor's role is to deliver the **core technology** that underpins the CCaaS solution, supporting seamless collaboration among all parties to ensure a successful outcome.

*System Integrator (Implementation Partner(s))*



- System Integrator (Implementation Partner(s)) to **lead and/or support key activities** to enable a Day 1 implementation of the ongoing run and optimise of the CCaaS solution in collaboration with HMRC
- HMRC require the SI (Implementation Partner(s)) to have an active role in the **run and optimise phases**, with contractual flexibility to ramp support up or down matched to HMRC internal capability
- The SI (Implementation Partner(s)) will also be required to undertake relevant delivery management and **stakeholder engagement responsibilities** to ensure ongoing alignment with wider enterprise-level strategy, working alongside HMRC teams.

*CCaaS Vendor*



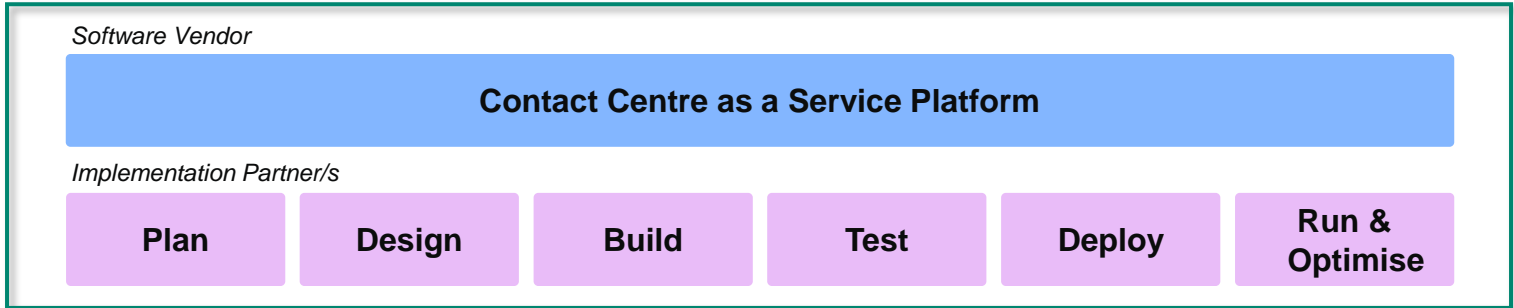
- A **single unified Cloud platform** that provides all core capabilities (e.g. Interaction Channels, Channel Management, Operational Management)
- Maintains and modernises current services for Day 1 with the ability to **scale and enhance** to meet the evolving needs of HMRC

## 3.2 Scope – CCaaS Software Vendor

The commercial scope sets out **what** HMRC will be buying from the market, and **how the requirements will be bundled** to go-to-market.

### Output Specification

The scope for this procurement fall into two overarching components: **CCaaS Software Specification** and **Implementation Partner Specification**.



### CCaaS Software Specification

A single unified cloud platform that provides all native core capabilities set out in a target CCaaS Capability Model including but not limited to:

- Interaction Channels (incl. IVR)
- Channel Management
- Advisor Desktop
- Data and AI Delivery
- Operational Management (including secure payment solution)
- Infrastructure (Network, Compute, Storage)
- Operational Management (including WFM/WEM)

HMRC will require a solution which supports all current mainstream HMRC contact channels to ensure current services are maintained on Day 1, future channel options and service enhancements including AI & Innovation capabilities and data driven optimisation.

### Native Capability Requirement & Definition

HMRC requires of its single, unified Cloud Contact Centre as a Service (CCaaS) that all features and capabilities are delivered natively by the proposed solution as part of their core offering.

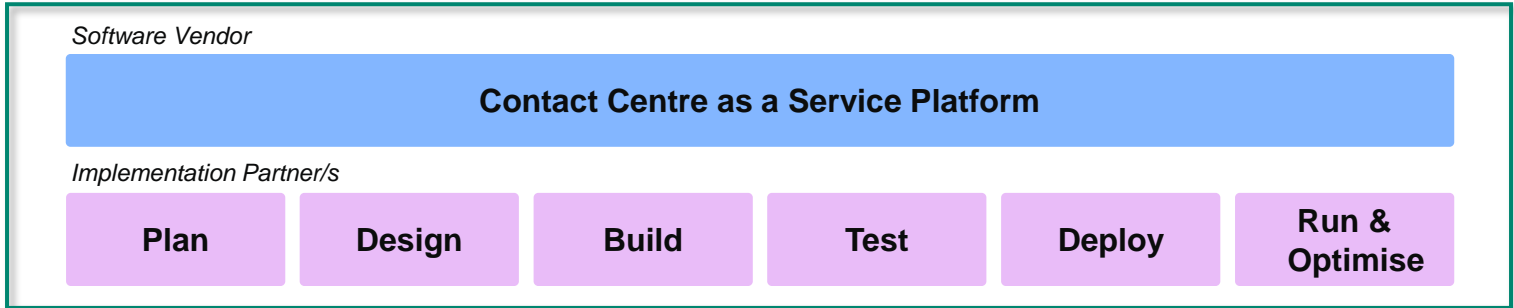
A feature or capability of the solution is considered native when it is developed, maintained, and delivered directly by the CCaaS provider as an integral part of the core cloud-hosted platform. Native Features do not rely on, and are not delivered by, third-party software, integrations (except for necessary integration to Authority payment providers etc), or partner solutions, ensuring seamless compatibility, consistent user experience, and support directly from the software provider. The core features or capabilities must be maintained solely by the CCaaS provider and not provisioned by add-ons via a marketplace or other addition source offered by third-party vendors.

### 3.3 Commercial Scope – Implementation Partner

The commercial scope sets out **what** HMRC will be buying from the market, and **how the requirements will be bundled** to go-to-market.

#### Output Specification

The scope for this procurement fall into two overarching components: **CCaaS Software Specification** and **Implementation Partner Specification**.



#### Implementation Partner Specification (acting as Prime)

Lead and deliver key activities to enable a Day 1 deployment and the ongoing run and optimisation of the CCaaS solution. These include:

- **Plan** – defining and managing an integrated delivery plan with the CCaaS vendor and HMRC aligned with the overarching CCaaS project management and governance approach
- **Design** – defining the architecture and functional elements for the secure integration of the CCaaS solution with HMRC’s existing IT environment
- **Build** – configuration and integration with existing systems, including data migration plan
- **Test** – development and execution of a comprehensive test strategy for the CCaaS deployment
- **Deploy** – development and execution of a comprehensive deployment management, cutover and go-live plan
- **Run and Optimise** – post-deployment, responsible for the ongoing run, maintenance and optimisation of the CCaaS solution, including continuous improvements

The Implementation Partner will also be required to undertake relevant delivery management and stakeholder engagement responsibilities to ensure ongoing alignment with wider enterprise-level strategy, working alongside HMRC teams.



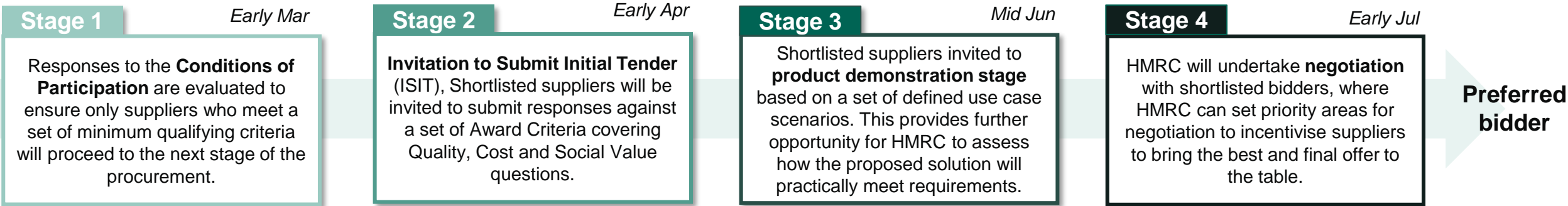
# 3.4 Commercial Approach

## Overview:

- Expecting to use the Competitive Flexible Procedure, under the new Procurement Act 2023
- Seeking joint proposals from SI (Implementation Partner plus specialist implementors where appropriate), supported by CCaaS Vendor
- Primary contractual relationship will be with SI (Implementation Partner); HMRC expects to have a relationship with all parties
- The expectation is for the model to use the [Model Services Contract \(MSC\)](#). Suppliers should familiarise themselves with the core terms as they will be expected to sign up to these with very few, if any, amendments
- The proposed contract term is for eight years
- Please take time to familiarise yourself with the [Financial Viability Risk Assessment \(FVRA\) Tool](#), and ensure you can provide the data required for this.

*For clarity, Software Vendors and Implementation Partners shall be expected to pass FVRA standards in all areas independently and not be reliant on a partner to meet the minimum standards.*

## The CFP will consist of four main stages:



*Please note:*

- *The commercial approach, including procurement timelines, are subject to change.*

**Key terms defined:**  
Vendor – CCaaS Platform  
SI (Prime) – Implementation and Run Provider  
Specialist Implementation Partner – Potential sub-contracted delivery partner alongside the SI (Prime)

### 3.5 Supplier Briefing Event – expected capability criteria

The EOI Supplier Briefing event for both SI Implementation Partners and CCaaS Vendors, is for organisations who can or aim to meet the following criteria, which may **form part of the Conditions of Participation of any subsequent procurement.**

Supplier	Category	Condition
All interested parties	Security & Compliance	Evidence of your organisation's compliance with/possession of certification and standards including:- ISO27001 (ISMS), ISO22301 (DCMS), ISO9001 (QMS), 140001
Vendor-specific criteria	Security & Compliance	Evidence of your organisation's compliance with/possession of certification and standards including: <ul style="list-style-type: none"><li>• NCSC Cyber Assurance Framework, NCSC Cloud Security Principles</li><li>• PCI DSS</li><li>• WCAG 2.2 (to conformance level A)</li></ul>
	Performance & scalability	HMRC require a CCaaS solution with proven scalability and reliability. Confirmation that your organisation's solution could handle: <ul style="list-style-type: none"><li>• Peak concurrent call volumes of 20,000 inbound calls and 400 outbound calls, with an uptime of 99.99%</li><li>• Peak concurrent webchats of at least 3,000</li></ul>
	Data Hosting	Confirmation that your organisation's solution is hosted in the UK and that all data will be hosted in the UK aligned with HMRC's data and security policy requirements
	Scale	Confirmation that the solutions supports a minimum of 200,000 agents globally using the full suite of CCaaS capabilities in a CCaaS cloud environment.
	Financial Standings	Please provide a summary of your total annual revenue for the most recent financial accounts - Financial Year (FY23/24).
SI Implementation Partner-specific criteria	Security & Compliance	Evidence of your organisation's compliance with/possession of certification and standards including:- Cyber Essentials Plus
	Financial Standings	Please provide a summary of your total annual revenue for the most recent financial accounts - Financial Year (FY23/24).
	Service Management & Support	HMRC will require a supplier with in-house expertise to deliver ongoing service management and technical support from the UK. Please provide details of your in-house expertise (not contractors, contingent labour or partner) based in the UK with the relevant accreditation/certification to deliver specialist services, including but not limited to the following areas: <ul style="list-style-type: none"><li>• Certified Professional Support personnel</li><li>• Certified IVR Specialists</li><li>• Certified Workforce Management Planner</li><li>• Certified Quality Management Expert</li><li>• ITILv4 certification to ensure adherence to best practices in service management and support</li></ul>

Key terms defined:

Vendor – CCaaS Platform

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Specialist Implementation Partner – Potential sub-contracted delivery partner alongside the SI (Prime)

## Next Steps

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### **Early 2025 – EOI Supplier Briefing Day:**

There will be a Supplier Briefing Day in for early 2025. This session is for both SIs and CCaaS Vendors, the purpose of this is to share additional detail relating to the project, including high-level requirements.

If you would like to attend and meet or plan to meet the criteria outlined, and would like to attend, please complete the attendance form and returned via email to [it-customer-engagement@hmrc.gov.uk](mailto:it-customer-engagement@hmrc.gov.uk) by Friday 17th January 2025.

The date of the supplier day will be communicated in due course.