

Contact Centre as a Service (CCaaS)

Project Overview

December – Briefing Notice



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:

Section	Title
1. Introduction & Business Context	1.1 Strategic Context
	1.2 Customer Contact Service Vision
2. CCaaS Capability	2.1 Target Capability Overview
3. Commercial Overview	3.1 Commercial Scope
	3.2 Commercial Approach
	3.3 Expected Supplier Criteria
4. Next steps	

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 centres 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

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

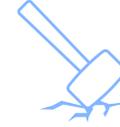
2.2 Target Capability Overview

The intention is to move towards a consolidated CCaaS solution in order to drive the following outcomes. The combination of which will result in a more integrated, reliable, easy to use service for customers.



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, including a seamless transition to the new platform, followed by ongoing support for day-to-day running and optimisation of the service. They should emphasise 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)) should offer innovation around optimisation, continuous improvement and provision of omnichannel delivery throughout the lifetime of the contract.
- 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

Contact Centre as a Service Platform

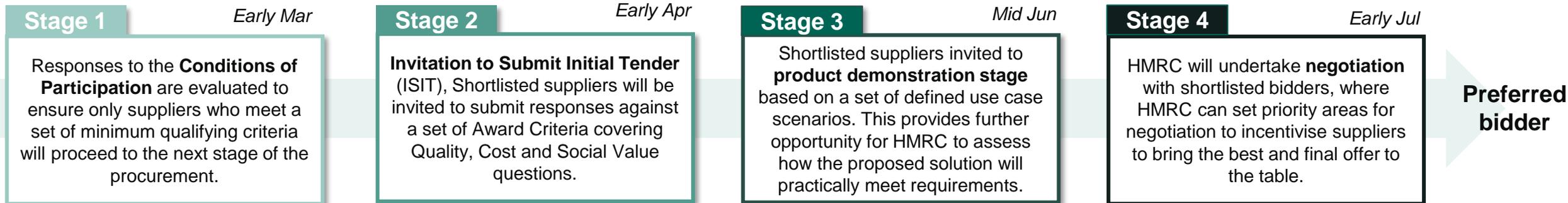
- A **single unified Cloud platform** that provides all core capabilities (e.g. Interaction Channels, Channel Management, Operational Management)
- Maintains and modernises current services for Day 1 with the ability to **scale and enhance** to meet the evolving needs of HMRC

3.2 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

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)

3.3 Supplier Briefing Event – Attendance Criteria

The EOI Supplier Briefing event will be by invitation-only to suppliers (both SI Implementation Partner and CCaaS Vendors) who are able to provide written confirmation that they meet these participation criteria. **These criteria may also form part of the Conditions of Participation at the first stage of the formal procurement event**, where HMRC reserves the right to exclude a supplier from further procurement stages where HMRC deems that the responses to these fail to meet its minimum requirements.

Supplier	Category	Condition
All interested parties	Security & Compliance	Evidence of your organisation’s compliance with/possession of certification and standards including: <ul style="list-style-type: none"> • Mandatory: ISO27001 (ISMS), ISO22301 (DCMS), ISO9001 (QMS), 140001
	Security & Compliance	Evidence of your organisation’s compliance with/possession of certification and standards including: <ul style="list-style-type: none"> • Mandatory: NCSC Cyber Assurance Framework, NCSC Cloud Security Principles • Mandatory: PCI DSS • Mandatory: WCAG 2.2 (to conformance level A)
Vendor-specific criteria	Performance & scalability	HMRC require a CCaaS solution with proven scalability and reliability. Confirmation that your organisation’s solution can currently handle: <ul style="list-style-type: none"> • Peak concurrent call volumes of up to 20,000 inbound calls and 400 outbound calls, with an uptime record of 99.99% • Peak concurrent webchats of at least 3,000
	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 CCaaS licensing revenue for the most recent financial accounts - Financial Year (FY23/24). To note, HMRC will not accept potential vendors for this procurement if a the HMRC expected OBC annual licensing value exceeds 10% of the Vendors annual CCaaS licensing revenue. HMRC expect Vendors to demonstrate CCaaS revenues of no less than £150m in 23/24
	Security & Compliance	Evidence of your organisation’s compliance with/possession of certification and standards including: <ul style="list-style-type: none"> • Mandatory: Cyber Essentials Plus
SI Implementation on Partner-specific criteria	Financial Standings	Please provide a summary of your total annual revenue and outline CCaaS delivery and run revenue for the most recent financial accounts - Financial Year (FY23/24). To note, HMRC will not accept potential SI Primes for this procurement if a the HMRC expected delivery and run value exceeds 15% of the Vendors annual revenue. HMRC expects SI (Primes) to demonstrate revenues of no less than £80m in 23/24
	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"> • Certified Professional Support personnel • Certified IVR Specialists • Certified Workforce Management Planner • Certified Quality Management Expert • ITILv4 certification to ensure adherence to best practices in service management and support

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

Next Steps

January 2025 – EOI Supplier Briefing Day:

There is a Supplier Briefing Day planned for January 2025 (exact date TBC). This session is for both SIs and Vendors, the purpose of this is to share additional detail relating to the project, including high-level requirements. This will be on an invite only basis, to the suppliers who meet the attendance criteria.

The attendance criteria form should be reviewed and returned via email to it-customer-engagement@hmrc.gov.uk by Friday 10th January 2025.