



Innovate
UK

Knowledge Transfer Network

AI for Services: Industry Report Request for Proposals

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AI for Services Lead
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1. Background

[AI for Services](#) is a UK wide network bringing together innovative businesses in Artificial Intelligence and data technologies, leading researchers and professionals working in accountancy, insurance, and legal services. Set up in June 2019, its aim is to support the transformation of the services sector in the UK by stimulating the use of AI and Data technologies in those sectors.

AI for Services is managed by the Knowledge Transfer Network on behalf of Innovate UK, part of UK Research and Innovation. This activity is part of the Industrial Strategy [Next Generation Services challenge](#) and support the objectives of the programme.

The Next Generation Services Challenge is a pioneer programme aimed at supporting the UK services sectors by developing “the next generation of knowledge services, built upon the responsible use of AI, coupled with increasing levels of data and digitisation, to the benefit of the UK”

The main objectives for the challenge are:

- 1) To support the leadership position of the UK in the global high value services sector (starting with Accountancy, Legal Services and Insurance)
- 2) Increased UK high- value data-driven services businesses’ engagement in R&D and improved R&D capability and capacity
- 3) To grow the burgeoning AI & Data analytics sector in the UK

2. Objectives

AI for Services - on behalf of Innovate UK UKRI - is seeking to commission a UK industry-wide mapping report to understand the UK strengths, specialisms and value in developing AI and Data technologies for the high value services sectors with a view to encourage greater levels of research and development in this area.

The report should also highlight emerging and future areas to develop the UK’s potential for increased use of AI in Services.

3. Scope of Work

3.1. Content

The report should be evidence based, cover all regions of the UK (i.e.: London and the relevant clusters outside of London) and focus on the accountancy, insurance and legal services industries. When relevant, reference to the financial and wider services sectors should be made. Six to eight specific case studies shall illustrate the report findings. Additionally, an online survey shall be set up to gather additional insight from AI for Services members.

The content of the report shall cover the following five sections:

- 1) Innovation Landscape: an outline of the different aspects that are influencing and shaping innovation in the sector including an overview of the supply and demand side and a particular emphasis on the level of market adoption of AI and Data technologies in the accountancy, insurance and legal services sectors
- 2) UK Strengths: a study of the current areas of strengths and specialisms of AI and data techniques being developed in the UK for the services sectors and its emerging applications. This section should include a mapping of the different actors within the ecosystem including research organisations and universities, AI & Data startups clusters, and private investment support programmes such as corporates and large firms incubators etc.
- 3) Technology transfer potential: an assessment of the potential for cross-over technologies within those sectors and with other sectors of the industry
- 4) Forecast: an analysis of the market and economic impact of AI driven services and a forecast on future trends
- 5) Recommendations: the report should conclude on a set of recommendations identifying the key opportunities and challenges faced by the sector

3.2. Audience

This report will be published online and is aimed primarily at members of the AI for Services network which comprises of individuals working in large accountancy, insurance and legal firms, AI and Data technologies businesses, government bodies, trading associations, academic institutions, research organisations and private investment firms.

The report shall also be of interest to the wider network of innovators, researchers and government representatives working in other sectors of the UK economy and internationally interested in research and innovation collaboration and market opportunities for the services sector and/or the AI & Data Sector.

The AI for Services team is planning to launch the report at a live event; this is likely to be held at a large AI/ Data conference in order to attract and reach the relevant targeted audience.

3.3. Key Deliverables

The key deliverables are:

- Deliverable 1: Inception Report
- Deliverable 2: Survey questionnaire and results
- Deliverable 2: Full Draft Report
- Deliverable 3: Signed off Publication

Deliverable 1: Inception Report

A short document outlining in detail the research approach, work plan, scope of the assignment, list of stakeholders to be consulted and initial literature review.

Deliverable 2: Survey questionnaire and results

A questionnaire for the survey and analysis of the results. KTN can arrange for the survey to be sent to AI for Services members.

Deliverable 3: First Iteration of Full Report

An initial draft of the report (~50 pages) including all tables, graphics and pictures.

Deliverable 3: Publication

The final signed off publication in pdf format ready for public consumption.

4. Timeline to be discussed

The timeline is as follows:

<u>Milestone</u>	<u>Date</u>
RFP issued to interested parties	20 th November 2019
Proposal Submission Date	20 th December 2019
Notification of results	13 th January 2020
Contract awarded	wc 13 th January 2020
Kick-off Meeting	wc 13 th January 2020
Inception Report and Survey questionnaire	Wc 17 th February 2020
Survey results	30 th March 2020
First iteration of Full report	30 th April 2020
Signed off publication	15 th May 2020

5. Budget

The level of support provided by the selected organisation(s) and associated budget is yet to be confirmed but should not exceed £60,000 inclusive of VAT.

6. Submission Requirements

In response to this RFP, please provide the following information:

Technical Approach

- Initial research methodology
- Initial list of stakeholders to consult
- Initial list of documents to be reviewed
- Initial work plan

Technical Capability

- A description of how you would meet the deliverables
- Evidence of past or current relevant work
- Evidence of domain knowledge in the service sector, namely accountancy, insurance, and legal.
- Evidence in domain knowledge in AI and data analytics applied to the services sector.

Staff Resources

- Staff resources and CVs of professionals who will undertake the work

Legal Information

- Professional Insurances in place
- Partnerships or joint ventures with other organisations

Schedule of Rates

- A proposed contract value, including a cost breakdown for all the deliverables detailed above. Prices and financial data must be provided in £ Sterling.

Additional Information

- Any additional services you could provide to enhance the project scope.
- Publicly brochures will not be accepted as responses.

Service providers must submit an electronic copy (in PDF format) of their response to RFP to astrid.ayel@ktn-uk.org on Friday 20th December no later than 17:00 (GMT).

7. Contract and Expiry Date

The work must commence wc 13th January 2020 with the work agreed to be completed by 15th May 2020.

The Contract will be awarded in accordance with a pricing proposal for the successful service provider. Payment will be dependent upon the successful delivery and approval by the KTN as below:

- 20% on signature of the contract
- 30% upon approval of the first iteration of the full report
- 50% upon approval of the publication version of the report

8. Principal Contact for the Request for Proposal

Please direct any questions or communications on this RFP to Astrid Ayel (astrid.ayel@ktn-uk.org)

9. Terms and Conditions

This Request for Proposal is subject to “KTN’s Terms and Conditions of Contractor Engagement – Company Edition”, which can be provided separately.