# Overview

This document contains the criteria that must be evidenced met in order to receive an invite to the January EOI Supplier Briefing Day. Please review the appropriate sections, complete this form, and return this as well as any relevant supporting evidence to [it-customer-engagement@hmrc.gov.uk](mailto:it-customer-engagement@hmrc.gov.uk). The deadline for submission is Friday 17th January 2025.

Each CCaaS Vendor is allowed to bring two representatives. Please note that if a System Integrator (Prime) plans to involve a third-party or Specialist Implementation Partner in delivering part or all of the solution, those third parties are welcome to attend the EOI Supplier Briefing Day as guests of the SI. Each SI is allowed to bring up to two representatives, plus an additional two representatives from the third party. Where a third party is invited, please provide details of the proposed party and the role you expect them to play in delivery of the requirement.

Key terms defined:

* Vendor – CCaaS Platform Provider
* Systems Integrator (Prime) – Implementation and Run Provider
* Specialist Implementation Partner – Potential key sub-contracted delivery partner alongside the SI (Prime)

# Supplier Information

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| --- | --- |
| **Organisation** |  |
| **Date completed** |  |
| **Organisation Contact** |  |
| **Email address** |  |
| **Role**  **(Software Vendor/SI etc)** |  |

# Confidentiality & External Engagement

HMRC will require those Suppliers invited to the Briefing Event and any/all subsequent related engagements, to sign up to the terms of a Non-Disclosure Agreement with HMRC which will require that Suppliers comply with the terms as set out. This will include following any guidance regarding external engagement and press releases/statements. HMRC reserves the right to take action for any failure to comply with the terms of the Non-Disclosure Agreement, which includes the exclusion from any further participation in the Briefing Event and any/all subsequent related engagements.

# All Interested Parties

Please provide evidence of your organisation’s compliance with/possession of certification and standards as outlined in the table below. Please note that compliance with all included in the list below is mandatory.

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| **Category** | **Criteria** | **Organisation compliant with this (Y/N)** | **Evidence provided? (Y/N)** |
| **Security & Compliance** | 1. ISO27001 (ISMS) 2. ISO22301 (DCMS) 3. ISO9001 (QMS) 4. ISO140001 (EMS) |  |  |

# CCaaS Vendor Specific Criteria *(Only complete if you are a software vendor)*

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| **Category** | **Criteria** | **Organisation compliant with this (Y/N)** | **Evidence provided? (Y/N)** |
| **Security & Compliance** | Evidence of your organisation and CCaaS Solution compliance with/possession of certification and standards including:   * Mandatory: NCSC Cyber Assurance Framework, NCSC Cloud Security Principles * Mandatory: PCI DSS * Mandatory: WCAG 2.2 (to conformance level A) |  |  |

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| **Category** | **Criteria** | **Criteria met (Y/N)?** |
| **Performance & scalability** | HMRC require a CCaaS solution with proven scalability and reliability. Your organisation’s solution can currently handle:   * 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** | Your organisation’s solution is hosted in the UK and that all data will be hosted in the UK. |  |
| **Scale** | The solution supports a minimum of 200,000 agents globally using the full suite of native CCaaS capabilities as outlined in the Briefing Notice 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). |  |

# Implementation Partner-specific Criteria *(Only complete if you are an SI)*

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| **Category** | **Criteria** | **Organisation compliant with this (Y/N)** | **Evidence provided? (Y/N)** |
| **Security & Compliance** | Evidence of your organisation’s compliance with/possession of certification and standards including:   * Mandatory: Cyber Essentials Plus |  |  |

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| **Category** | **Criteria** | **Criteria met (Y/N)?** |
| **Financial Standings** | Please provide a summary of your total annual revenue for the most recent financial accounts - Financial Year (FY23/24). |  |

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| --- | --- | --- |
| **Category** | **Criteria** | **Supporting information** |
| **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:   * 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 |  |