

**Annex A – Statement of Requirements**

Contract Reference: CCCC21A06 - Provision of Specialist Advisory Services for SME Business Support Programme

CONTENTS

[1. PURPOSE 3](#_Toc63335811)

[2. BACKGROUND TO THE CONTRACTING aUTHORITY 3](#_Toc63335812)

[3. Background to requirement/OVERVIEW of requirement 3](#_Toc63335813)

[4. definitions 4](#_Toc63335814)

[5. scope of requirement 4](#_Toc63335815)

[6. The requirement 5](#_Toc63335816)

[7. MANAGEMENT INFORMATION/reporting 6](#_Toc63335817)

[8. continuous improvement 6](#_Toc63335818)

[9. quality 6](#_Toc63335819)

[10. STAFF AND CUSTOMER SERVICE 6](#_Toc63335820)

[11. Security and CONFIDENTIALITY requirements 6](#_Toc63335821)

[12. Ethical Walls 7](#_Toc63335822)

[13. CONTRACT MANAGEMENT 7](#_Toc63335823)

[14. Location 7](#_Toc63335824)

# PURPOSE

## The UK economy and particularly Small and Medium Sized Enterprises (SMEs) have been hit hard by the COVID-19 pandemic. To support these businesses to realise their potential and help boost the UK’s productivity the Chancellor of the Exchequer would like to develop an SME digital adoption business support programme that includes an online support hub and voucher scheme to subsidise software costs. This should help SMEs adopt new productivity-enhancing software by addressing barriers to identifying, buying and implementing relevant solutions.

## The purpose of this exercise is to procure specialist external advisory support to assist with the design of the software voucher scheme and developing requirements of a long-term delivery partner for the overall programme.

# BACKGROUND TO THE CONTRACTING aUTHORITY

## HM Treasury (“the Customer”) is the UK’s finance and economics ministry, maintaining control of public spending, setting the direction of the UK’s economic policy, and working to achieve strong and sustainable growth. It has policy responsibility for the development of the SME digital adoption business support programme.

# Background to requirement/OVERVIEW of requirement

* 1. Research has found a positive correlation between the adoption of certain digital technologies and firm-level productivity. However, rates of digital adoption among UK SMEs are low by international standards. A lack of awareness, skills, and finance are often cited as the major barriers to SMEs adopting technologies successfully.
  2. In response to the economic impacts of the pandemic, the Chancellor has asked HMT officials to work with industry to deliver a new programme that addresses the barriers SMEs face when identifying, buying and implementing digital software.
  3. The Customer expects there will be a need to feed into various elements of this scheme including: policy design of the programme, help develop a process to enable software suppliers to pre-register their products and the claims process for the voucher, and assess the economic impact of this policy proposal. The overall policy goal is to develop a platform that will allow SMEs to identify in-scope solutions and ensure these meet basic standards compatible with the scheme’s aims.

## Research has

# definitions

|  |  |
| --- | --- |
| **Expression or Acronym** | **Definition** |
| SME | Small or medium-sized enterprise with fewer than 250 employees |
| Industry | SMEs (users), software providers (suppliers), Business Representative Organisations, banks, accountants, advisors |
| Delivery Partner | Third-party provider to HMT |
| Enterprise Software | Customer Relationship Management, Enterprise Resource Planning, Human Resources, Cloud Accounting, Supply Chain Management |
| HMT | Her Majesty’s Treasury |

# 

# scope of requirement

## Under this Contract, the Supplier will be required to provide advisory support in relation to the policy design of a new government led business support programme for SMEs adopting productivity-enhancing software

## The scope of this initial work will include advice on options and structures for the voucher scheme (including claims, redemption and product approval processes), as well as assessing the potential impact of these design options on the UK enterprise software market.

## The Supplier will also be required to present analysis to support the Customer in defining its requirements/specifications when it subsequently procures a long-term delivery partner to build, maintain and operate/administer an online support hub and voucher scheme.

## To successfully deliver this requirement, the Supplier must have expertise in the following areas:

### understanding of the enterprise software market

### design and delivery of financial support (e.g. vouchers, loans, grants) schemes for businesses

### digital transformation projects

### SME productivity and technology

### stakeholder engagement with respect to the UK’s tech sector and SMEs.

# The requirement

## The Customer requires the following deliverables to be undertaken under the Contract:

## **REDACTED**

# MANAGEMENT INFORMATION/reporting

## 7.1 The Supplier will provide weekly updates and information on progress of project deliverables. These will be worked out and agreed by both parties as the specific work is scoped.

# continuous improvement

## The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## Changes to the way in which the Services are to be delivered must be brought to the Authority’s attention and agreed prior to any changes being implemented.

## Not applicable

# quality

## The assessment should be of the high standards that would be expected from a leading consultancy firm.

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

## The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

## The Supplier shall ensure that staff understand the Authority’s vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

# Security and CONFIDENTIALITY requirements

## The Supplier’s staff should have the suitable qualifications and experience to enable undertake the work.

## The Supplier must keep confidential any information provided to it to enable it to produce its assessment

## Any advice provided by the Supplier is confidential and must not be disclosed to any party other than the Customer.

## The Supplier is reminded that they have previously signed a Non-Disclosure Agreement as requested to by the Customer. The Customer will hold the Supplier to this agreement. The signed Non-Disclosure Agreement is included at Annex C of this contract.

# Ethical Walls

## In signing this contract, the Supplier confirms that any potential, actual or perceived conflicts of interest that may be relevant to this requirement will be declared.

## The Supplier will, prior to award of this contract and for its full duration, conduct full and extensive checks to identify all services that the Supplier provides have clear conflicts of interest protocols in place to ensure that conflicts of interest do not arise and that information gained during delivery of this contract is not disclosed inappropriately or misused.

## The Supplier shall further ensure that it has clear and transparent:

* Organisational independence;
* Ethical walls;
* Personal independence of its staff as well as any subcontractors that may choose appoint (Subject to the agreement of the Customer); and
* Confidentiality for the Customer and any third parties that the Customer may choose to engage with.

# CONTRACT MANAGEMENT

## The Supplier is required to attend periodical meetings as required by the Customer.

## Attendance at Contract Review meetings shall be at the Supplier’s own expense.

# Location

## The location of the Services will be carried out virtually given the Government’s recommendation to work from home in response to the COVID-19 pandemic.