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Tender

## **Procurement of an IT Managed Service**

Financial Ombudsman Service

F02: Contract notice

Notice identifier: 2021/S 000-015281

Procurement identifier (OCID): ocds-h6vhtk-02c324

Published 2 July 2021, 10:45pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Financial Ombudsman Service

Exchange Tower, Harbour Exchange Square,

London

E14 9SR

#### **Email**

[procurement.enquiries@financial-ombudsman.org.uk](mailto:procurement.enquiries@financial-ombudsman.org.uk)

#### **Telephone**

+44 2032229656

#### **Country**

United Kingdom

## **NUTS code**

UKI - London

## **Internet address(es)**

Main address

<https://www.financial-ombudsman.org.uk>

## **I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://procurement.financial-ombudsman.org.uk/web/login.html>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://procurement.financial-ombudsman.org.uk/web/login.html>

Tenders or requests to participate must be submitted to the above-mentioned address

## **I.4) Type of the contracting authority**

Body governed by public law

## **I.5) Main activity**

Economic and financial affairs

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Procurement of an IT Managed Service

#### **II.1.2) Main CPV code**

- 72000000 - IT services: consulting, software development, Internet and support

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

The Financial Ombudsman Service intends to place a contract for the provision of managed IT services to encompass:

- 1) Ongoing support, maintenance and development of our case management system;
- 2) Ongoing support, maintenance and development of our new cloud-based enterprise data warehouse;
- 3) Design, development and ongoing support and maintenance of a new digital engagement capability for our business; and
- 4) Provision of IT resources on demand to augment the Financial Ombudsman Service's team on an ad-hoc basis.

#### **II.1.6) Information about lots**

This contract is divided into lots: No

### **II.2) Description**

#### **II.2.2) Additional CPV code(s)**

- 72200000 - Software programming and consultancy services
- 72400000 - Internet services

- 72500000 - Computer-related services
- 72600000 - Computer support and consultancy services

### **II.2.3) Place of performance**

NUTS codes

- UKI - London

### **II.2.4) Description of the procurement**

#### **1) Ongoing support, maintenance and development of our case management system**

Our case management system is built on Microsoft Dynamics 365 CRM at its core with an ecosystem of other applications to facilitate document ingestion and document production. The case management system enables our 2,100 caseworkers to process the complaints we receive. In 2020/21 we received 454,259 new enquiries and 278,033 complaints. Each one of these is logged by our case management system.

The successful tenderer will be responsible for support and maintenance of the case management system and working with our team to successfully develop the case management system in line with our requirements. Future development may include machine-learning and intelligent automation.

#### **2) Ongoing support, maintenance and development of our new cloud-based enterprise data warehouse**

Our enterprise data warehouse is the central data repository for the Financial Ombudsman Service. It aggregates data from 12 data sources and facilitates ~100 reports and dashboards that are key to the efficient and effective operation of our business. The enterprise data warehouse is currently being built on Microsoft Azure data platform technologies and will go live in the first quarter of 2022, replacing our current on-premise data warehouse. The successful tenderer will be responsible for support and maintenance of the enterprise data warehouse and successfully developing the enterprise data warehouse in line with our requirements.

#### **3) Design, development and ongoing support and maintenance of a new digital engagement capability for our business**

The Financial Ombudsman Service wants to develop new digital engagement channels to engage with our customers and financial institutions. This will allow:

-Our customers to raise complaints and communicate and share information with us their

complaint is processed to outcome; and

-Financial institutions to communicate and share information in relation to complaints raised against them.

After designing and building the digital channels, the successful tenderer will be responsible for support and maintenance of the digital channels (including our existing external website) and the continued development of the digital channels in line with our requirements.

4) Provision of IT resources on demand to augment the Financial Ombudsman Service's team on an ad-hoc basis

Provision of IT resources to augment our team, as called-off by us on an ad-hoc basis, including IT project and portfolio management resources, IT infrastructure resources, information security resources and architecture resources.

These resources maybe involved in project or business as usual activities outside of services 1) to 3) above.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

A 4 year contract with the option to extend for a further 4 years in annual increments.

### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged number of candidates: 5

Objective criteria for choosing the limited number of candidates:

The 5 highest scoring SQ responses will be invited to tender for the requirements. See procurement documentation for further information, including scoring and selection criteria.

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: No

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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### **Section III. Legal, economic, financial and technical information**

#### **III.1) Conditions for participation**

##### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

##### **III.1.3) Technical and professional ability**

Selection criteria as stated in the procurement documents

#### **III.2) Conditions related to the contract**

##### **III.2.2) Contract performance conditions**

As stated within the draft Terms and Conditions as issued with the tender documents.

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Competitive procedure with negotiation

#### **IV.1.4) Information about reduction of the number of solutions or tenders during negotiation or dialogue**

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated

#### **IV.1.5) Information about negotiation**

The contracting authority reserves the right to award the contract on the basis of the initial tenders without conducting negotiations

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: No

### **IV.2) Administrative information**

#### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

2 August 2021

Local time

5:00pm

#### **IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates**

23 August 2021

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 12 (from the date stated for receipt of tender)

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### **Section VI. Complementary information**

#### **VI.1) Information about recurrence**

This is a recurrent procurement: No

#### **VI.2) Information about electronic workflows**

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

#### **VI.4) Procedures for review**

##### **VI.4.1) Review body**

Financial Ombudsman Service

London

E14 9GE

Country

United Kingdom