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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

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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

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

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 may be 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

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.

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)

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