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Award

Strategic License Subscriptions and Advisory Services

HM Revenue & Customs

UK6: Contract award notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-030521

Procurement identifier (OCID): ocds-h6vhtk-04e90e ([view related notices](#))

Published 6 June 2025, 11:41am

Scope

Description

To guarantee the efficient utilisation of technology, transform our digital and customer services, and fulfil public service commitments, His Majesty's Revenue and Customs (HMRC) requires research subscription services.

This service will assist in setting strategies, managing projects, deploying new technologies, and ensuring regulatory compliance, amongst other things.

Additionally, an on-demand ad-hoc advisory service is necessary to translate industry-leading insights into actionable plans, across different business areas and topics.

The requirements have been split into 4 lots based on individual business area requirements with varying scope.

Please note, the Authority have determined this requirement to be VAT recoverable meaning the contract value will be exclusive of VAT. A value for 'Including VAT' has been included

within each relevant section as required by the FTS system. Values provided are inclusive of the optional 12 month extension. Values are indicative maximums and provide no

commitment of spend or usage.

Lot 1. Lot 1 - CDIO (Chief Digital and Information Officer)

Description

To guarantee the efficient utilisation of technology, transform our digital and customer services, and fulfil public service commitments, HMRC requires research subscription services. This service will assist in setting strategies, managing projects, deploying new technologies, and ensuring regulatory compliance, amongst other things. Additionally, an on-demand ad-hoc advisory service is necessary to translate industry-leading insights into actional plans, across different Business Areas and topics. The research service for CDIO should cover the following aspects:

- General requirements
- Access to a research library providing independent, objective and expert re-search reports, tools, case studies to support HMRC achieving its objectives.
- Access to relevant research including but not limited to, IT implementation, design, architecture, engineering, support management, AI data and reference architectures.
- The research library must include as a minimum, available sessions within the overall categories of Digital Business Transformation/Strategy, Building Strong Teams and Generating Innovation/Value.
- It is expected that the research material is regularly refreshed to support fast-moving areas such as AI or data.
- Access to strategic business content for technology leaders, supporting them to become better business partners and enterprise leaders
- Access to people who have done 'what we are doing' before in different contexts and can advise on pitfalls/best practice when evaluating different approaches, methods, technologies or strategies.
- Independent view of the market both from a technical perspective (what technologies are being used for what) and a business perspective (what approaches are working).
- Reviews of papers from an independent but expert point of view, for accuracy and messaging.
- Leadership content that is targeted at senior leaders to help transform HMRC.
- Support software development lifecycles, insights and best practices for source control, branching, merging, and software development lifecycles.
- Events/conferences access to ensure HMRC are aware of the evolving technologies and evolving IT challenges.
- Networking opportunities and introduction to peer organisations and people to dive deeper into relevant experiences.
- Access to peers

across the domain to showcase HMRC to attract technology talent. Ad-hoc advisory services• Ad-hoc advisory service to help develop documentation supporting strategic tasks and key deliverables, relating to business change or transformation. Examples include strategy development, financial planning, roadmap development, e.g., transformation, AI etc., as well as specialist technology areas.Licences / subscriptions required:• 40 subscriptions to access research libraries, research and tools based on industry best practice, access to analyst briefings, and networking opportunities. • 8 subscriptions to access research libraries, research and tools based on industry best practice, access to analysts, alignment to subject matter experts. Peer-connect and facilitated networking. • 2 subscriptions providing a guided service to access research libraries, re-search and tools based on industry best practice, access to analysts, alignment to subject matter experts. Dedicated executive support with specific domain knowledge. Peer-connect and facilitated networking. • 1 subscription providing a guided service to access research libraries, re-search and tools based on industry best practice, access to analysts, alignment to subject matter experts. Dedicated executive support with specific domain knowledge. Peer-connect and facilitated networking. Customised engagement at CIO level. • 1 subscription to provide expert advice for Software Engineers.

Lot 2. Lot 2: CSG (Customer Services Group) and ETG (Enterprise Transformation Group)

Description

CSG and ETG requires access to world class research and business insights on a range of matters related to optimising our Customer Service provision. The Directors of CSG and ETG are looking for a range of support services which includes but not limited to:• Strategy overall/strategic roadmaps• Multichannel strategy/Shift to digital• Customer centric ways of working overall• Architecture• Service capabilities• End-to-end digital services and digital service/product management• End-to-end customer journey management• Customer experience overall• Innovation and AI• End-to-end means someone getting a letter or being on Google all the way through to compliance and solicitors• Metrix and balanced scorecards• Multichannel analytics• Next best action and engagement strategies including air traffic control, nudges, prompts• Change delivery models• Portfolio management• Customer service operating models in context of customer service and the full organisation, e.g. digital service target operating model• Organisation design• People capability and skills/adopting digital skills and ways of learning• Performance measurement and best practice• Expert business guidance on tax experts• Business delivery and customer service delivery guidance. In summary, we are seeking an offer that joins up service and modern IT i.e. end-to-end product management and delivery of digital channel and app, that enables

understanding of marketing propositions and how to put together a service proposition. Licences / subscriptions required:

- 5 subscriptions to access research libraries, research and tools based on industry best practice, access to analysts, alignment to subject matter experts. Peer-connect and facilitated networking.
- 4 subscriptions providing a guided service to access research libraries, re-search and tools based on industry best practice, access to analysts, alignment to subject matter experts. Dedicated executive support with specific domain knowledge. Peer-connect and facilitated networking.

Lot 3. Lot 3 - Internal Audit

Description

To support the IA unit's delivery of our 2025-28 internal audit strategy, alongside supporting our business-as-usual audit work, we require research subscription and advisory services. The service will provide access to subject matter experts to support the senior leadership team in setting and driving forward our strategy, as well as the provision of a wide range of research materials and audit toolkits to assist our team in delivering our audit plans.

Insights and Expert Advice (strategic) - access to:

- Expert support, guidance, and advice for the Chief Audit Executive to support strategy development, decision making and planning.
- IA function benchmarking and other assessment tools (e.g. skills and capabilities) and guides to measure / compare performance.
- Research and reports on, but not limited to audit strategy development, emerging global and sector risks, emerging trends / innovation in the IA profession, and broader strategic audit leadership support.
- Webinars and conferences on emerging trends relevant to audit.
- Market intelligence on proposed use of audit management / data analytics technology.
- Networking Opportunities with peers of similar backgrounds and experiences to share wins, lessons learned and best-practice insights.

Data and Analytics Capabilities - access to:

- Data analytics maturity assessments, case studies, expert support, use cases.

Practical resources, tools and frameworks - access to:

- Insights, research, best practice, audit resources, practical tools and frameworks to expand risk, control and business knowledge and inform audit scoping, facilitating more efficient ways of working and stronger performance.
- Support on technical aspects on specific audits.

Provision of training & information - access to:

- Learning and development sessions for the wider team (soft and professional).

License/Subscription

- 1 collective subscription that provides access for the internal audit senior executive and select team members to research and insight, peer engagement, insights and research, learning events, executive networking opportunities, advisory support, best practices, benchmarking and other diagnostic tools.

Lot 4. Lot 4 - HR

Description

HR are looking to gain access to industry best practice and insight to enable the support of HMRC to meet its challenging business objectives through effective use of our people. License holders require access to material covering (but not limited to) the following topics: • Equality, Diversity and Inclusion • Employee Experience • Future of Work • Organisation Design • Leadership • Culture • HR functional management • Leadership of change • Health, Safety and Wellbeing • HR strategy • HR technology • Recruitment • Talent Development • Talent management and Development • Learning and Development • Future HR trends • Networking opportunities and introduction to peer organisations and people to dive deeper into relevant experiences • Webinars and conferences relevant to HR We are looking for a service which both advises on best practice and supports us in applying this effectively in HMRC. Licence / Subscriptions required: • 4 subscriptions to access HR research and best practice, benchmarks and case studies, tools based on industry best practice, online and virtual learning, access to expert analysts and live events. • 6 subscriptions to access HR research and best practice, benchmarks and case studies, tools based on industry best practice and online and virtual learning.

Contract 1. Strategic License Subscriptions and Advisory Services. Lot 1 - CDIO (Chief Digital and Information Officer)

Lots

Lot 1. Lot 1 - CDIO (Chief Digital and Information Officer)

Supplier

- GARTNER U.K. LIMITED

Contract value

- £2,300,750 excluding VAT
- £2,610,900 including VAT

Above the relevant threshold

Award decision date

5 June 2025

Date assessment summaries were sent to tenderers

6 June 2025

Standstill period

- End: 17 June 2025
- 8 working days

Earliest date the contract will be signed

30 June 2025

Contract dates (estimated)

- 1 October 2025 to 31 March 2027
- Possible extension to 31 March 2028
- 2 years, 6 months

Description of possible extension:

Optional 12 month extension.

Main procurement category

Services

CPV classifications

- 73000000 - Research and development services and related consultancy services

Contract locations

- UK - United Kingdom
-

Contract 2. Strategic License Subscriptions and Advisory Services. Lot 2: CSG (Customer Services Group) and ETG (Enterprise Transformation Group) Description

Lots

Lot 2. Lot 2: CSG (Customer Services Group) and ETG (Enterprise Transformation Group)

Supplier

- FORRESTER RESEARCH LIMITED

Contract value

- £727,192.80 excluding VAT
- £872,631.36 including VAT

Above the relevant threshold

Award decision date

5 June 2025

Date assessment summaries were sent to tenderers

6 June 2025

Standstill period

- End: 17 June 2025
- 8 working days

Earliest date the contract will be signed

30 June 2025

Contract dates (estimated)

- 1 July 2025 to 31 March 2027
- Possible extension to 31 March 2028
- 2 years, 9 months

Description of possible extension:

Optional 12 month extension.

Main procurement category

Services

CPV classifications

- 73000000 - Research and development services and related consultancy services

Contract locations

- UK - United Kingdom
-

Contract 3. Strategic License Subscriptions and Advisory Services. Lot 3 - Internal Audit

Lots

Lot 3. Lot 3 - Internal Audit

Supplier

- GARTNER U.K. LIMITED

Contract value

- £105,875 excluding VAT
- £127,050 including VAT

Above the relevant threshold

Award decision date

5 June 2025

Date assessment summaries were sent to tenderers

6 June 2025

Standstill period

- End: 17 June 2025
- 8 working days

Earliest date the contract will be signed

30 June 2025

Contract dates (estimated)

- 1 July 2025 to 31 March 2027
- Possible extension to 31 March 2028
- 2 years, 9 months

Description of possible extension:

Optional 12 month extension.

Main procurement category

Services

CPV classifications

- 73000000 - Research and development services and related consultancy services

Contract locations

- UK - United Kingdom
-

Contract 4. Strategic License Subscriptions and Advisory Services. Lot 4 - HR

Lots

Lot 4. Lot 4 - HR

Supplier

- GARTNER U.K. LIMITED

Contract value

- £418,000 excluding VAT
- £501,600 including VAT

Above the relevant threshold

Award decision date

5 June 2025

Date assessment summaries were sent to tenderers

6 June 2025

Standstill period

- End: 17 June 2025
- 8 working days

Earliest date the contract will be signed

30 June 2025

Contract dates (estimated)

- 1 October 2025 to 31 March 2027
- Possible extension to 31 March 2028
- 2 years, 6 months

Description of possible extension:

Optional 12 month extension.

Main procurement category

Services

CPV classifications

- 73000000 - Research and development services and related consultancy services

Contract locations

- UK - United Kingdom

Information about tenders

Lot 1. Lot 1 - CDIO (Chief Digital and Information Officer)

- 4 tenders received
- 4 tenders assessed in the final stage:
 - 0 submitted by small and medium-sized enterprises (SME)
 - 0 submitted by voluntary, community and social enterprises (VCSE)
- 1 supplier awarded contracts
- 3 suppliers unsuccessful (details included for contracts over £5 million)

Lot 2. Lot 2: CSG (Customer Services Group) and ETG (Enterprise Transformation Group)

- 3 tenders received
- 3 tenders assessed in the final stage:

- 0 submitted by small and medium-sized enterprises (SME)
 - 0 submitted by voluntary, community and social enterprises (VCSE)
 - 1 supplier awarded contracts
 - 2 suppliers unsuccessful (details included for contracts over £5 million)
-

Lot 3. Lot 3 - Internal Audit

- 2 tenders received
 - 2 tenders assessed in the final stage:
 - 0 submitted by small and medium-sized enterprises (SME)
 - 0 submitted by voluntary, community and social enterprises (VCSE)
 - 1 supplier awarded contracts
 - 1 supplier unsuccessful (details included for contracts over £5 million)
-

Lot 4. Lot 4 - HR

- 2 tenders received
- 2 tenders assessed in the final stage:
 - 0 submitted by small and medium-sized enterprises (SME)
 - 0 submitted by voluntary, community and social enterprises (VCSE)
- 1 supplier awarded contracts
- 1 supplier unsuccessful (details included for contracts over £5 million)

Procedure

Procedure type

Open procedure

Suppliers

FORRESTER RESEARCH LIMITED

- Companies House: 03400112
- Public Procurement Organisation Number: PPYD-3753-WQPR

1 Blossom Yard

London

E1 6RS

United Kingdom

Email: forrgov@forrester.com

Website: <http://www.forrester.com>

Region: UKI41 - Hackney and Newham

Small or medium-sized enterprise (SME): No

Voluntary, community or social enterprise (VCSE): No

Supported employment provider: No

Public service mutual: No

Contract 2. Strategic License Subscriptions and Advisory Services. Lot 2: CSG (Customer Services Group) and ETG (Enterprise Transformation Group) Description

GARTNER U.K. LIMITED

- Companies House: 02266016
- Public Procurement Organisation Number: PXQQ-2141-PWDM

Tamesis

Egham

TW20 9AH

United Kingdom

Email: ukpublicsectorframeworks@gartner.com

Website: <http://gartner.com>

Region: UKJ25 - West Surrey

Small or medium-sized enterprise (SME): No

Voluntary, community or social enterprise (VCSE): No

Supported employment provider: No

Public service mutual: No

Contract 1. Strategic License Subscriptions and Advisory Services. Lot 1 - CDIO (Chief Digital and Information Officer)

Contract 3. Strategic License Subscriptions and Advisory Services. Lot 3 - Internal Audit

Contract 4. Strategic License Subscriptions and Advisory Services. Lot 4 - HR

Contracting authority

HM Revenue & Customs

- Public Procurement Organisation Number: PVMW-8599-JZNJ

100 Parliament Street

London

SW1A 2BQ

United Kingdom

Email: hmrcsupportsapariba@hmrc.gov.uk

Region: UKI32 - Westminster

Organisation type: Public authority - central government