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Tender

## HMRC Customer Relationship Management

HM Revenue & Customs

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-041282

Procurement identifier (OCID): ocds-h6vhtk-050568 ([view related notices](#))

Published 18 July 2025, 12:59pm

## Scope

## Description

As part of the Authority's Enterprise Customer Relationship Management Programme, it is seeking a supplier to provide Software as a Service Customer Relationship Management. There will likely be future procurements for an Intelligent Client Function, System and Service integrators and supplementary software capabilities.

The requirement for this procurement covers the following capabilities:

- Marketing & Campaign Management
- Customer Management
- Case Management
- Interaction, Channel and Messaging Management
- AI
- Insights

- Reporting & Intelligence
- Customer Experience (Customer Portal and App)
- Identity, Verification & Authentication
- Secure Digital Exchange Communications (SDEC)
- Fraud
- Data & Integration Management
- Operational Management
- Knowledge Management
- Non-Compliance Management

Certain capabilities are required to be delivered on a First Party basis, specific details are provided within the CoP document.

Suppliers are also expected to provide an element of professional services to support implementation.

### **Total value (estimated)**

- £2,000,000,000 excluding VAT
- £2,400,000,000 including VAT

Above the relevant threshold

### **Contract dates (estimated)**

- 1 May 2026 to 30 April 2036
- Possible extension to 30 April 2041

- 15 years

Description of possible extension:

The Authority anticipates a 10 year initial period with optional extensions taking the total contract length up to 15 years.

Extensions will be exercised at the discretion of the Authority.

## **Options**

The right to additional purchases while the contract is valid.

Additional CRM Licences, associated capabilities, and Professional Services. This could include future innovation and elements of the vendors development roadmap within the scope of CRM.

Should a contract be awarded, it shall be awarded on a non-exclusive basis and the Authority reserves the right to enter into agreement with other suppliers for the same or similar services.

## **Main procurement category**

Services

## **CPV classifications**

- 48000000 - Software package and information systems
- 72000000 - IT services: consulting, software development, Internet and support

## **Contract locations**

- UK - United Kingdom

## **Justification for not using lots**

Buying multiple different products for different capabilities would likely introduce integration risks, increasing complexity and reducing value for money.

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## **Submission**

### **Enquiry deadline**

31 July 2025, 12:00pm

### **Submission type**

Requests to participate

### **Deadline for requests to participate**

13 August 2025, 12:00pm

## **Submission address and any special instructions**

Supplier's who wish to participate must follow the steps below in order to access the CRM event in the Authority's instance of SAP Ariba, where supplier's will be able to view the

tender documentation and respond to the Authority. Those suppliers who have already provided their details to express an interest in this opportunity through the Planned Procurement Notice do not need to re-register their interest. Those who have participated in the market engagement activity but not explicitly re-registered their interest do need to re-provide their Ariba details.

Registering on Ariba:

#### STEP 1

To register for an Ariba account please follow the link below in full. Please note that to access the Authority's instance of Ariba for the first time you must enter via the below link regardless of whether you have an existing account for the wider Ariba procurement network.

<http://hmrc.sourcing-eu.ariba.com/ad/selfRegistration>

Please Note: For those Suppliers who are already registered, please skip STEP 1 and go straight to STEP 4.

#### STEP 2

If your organisation does not have an existing account on the wider Ariba supplier network, fill out all mandatory fields on the form including 'Company Information' and 'User Account Information' and select 'Register' (marked in red). If your organisation already has an existing account on the wider Ariba supplier network. Select 'Login' (marked in blue) to enter your credentials and submit your organisation for Authority approval.

#### STEP 3

This step assumes that a supplier is new to the wider Ariba supplier network and is setting up an account for the first time. If you have followed the process for an organisation with an account on the wider Ariba supplier network, please skip to Step 4. After submitting your details on the landing page, you will be redirected to a second page asking you to confirm your email address. The system will send an auto-generated email to the email address you registered the account with. To move to the next step of the process please follow the 'Click here to activate your Ariba account' link in the email.

#### STEP 4

Following the email link in STEP 3 redirects you to the Authority's instance of Ariba where you will be asked to provide further profile information as part of our Supplier Profile Questionnaire. You must complete and submit this information in order to participate in procurement 'events'. Following the verification link will also submit your profile for

approval. Your account will only be fully activated once approval from the Ariba Systems Team has been received.

## STEP 5

Completing and submitting your company profile will send your account for approval. Once your account has been verified and approved by this team you will receive an email as below. In the event of your account not being approved a member of the team will contact you stating why this is the case. The most common reason usually being that your organisation has an existing account on the Authority's instance of Ariba.

## STEP 6

The registration process is now complete. Following the link to <http://proposals.seller.ariba.com> will allow you to log into your account as below. Entering your login details on this page will take you directly through to your Ariba Commerce Cloud dashboard. It is on this page that events which you have been granted access to will appear.

## STEP 7

In order to gain access to an e-Sourcing 'event' that you have seen advertised in Find a Tender Service or on Contracts Finder you must have successfully registered for an account. If you have an account on the wider Ariba supplier network this will not be sufficient to access the Authority's procurement 'events' and you will need to follow the process detailed earlier in this pack - 'How to Register'. When you have successfully registered and been approved on the Authority's instance of Ariba you will be sent an automatically generated system ID via an email like the below. This number will begin 'AN...' and is required in order for the Authority's Commercial Officers to be able to add you to e-Sourcing procurement events.

## STEP 8

Details of the Commercial Officer running the procurement exercise can be found in the 'About the Buyer' section of Find a Tender Service and Contracts Finder. This area provides the Officer's name and contact details. Should you wish to access the event please email the buyer in question at the email address stated on the notice detailing the following information quoting the title of the 'event' that you would like to access:

- Your ANID
- Your name
- Your organisation's name

- Your contact details

The Commercial Officer will then be able to grant you access to the 'event' including full tender documentation and supporting documents.

## **Tenders may be submitted electronically**

Yes

## **Languages that may be used for submission**

English

## **Award decision date (estimated)**

1 May 2026

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## **Award criteria**

<b>Name</b>	<b>Description</b>	<b>Type</b>
Quality	Quality, including but not limited to the ability to meet functional and non-functional requirements, qualitative questions, and product demonstrations shall be weighted at 90%.	Quality
Social Value	Social Value shall be weighted at 10%.	Quality

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Name	Description	Type
Price	Price will be evaluated on a Price price per quality point (PQP) basis.	

## Weighting description

The Authority shall use a percentage weighting to evaluate the qualitative elements at each stage.

The Authority is seeking to evaluate Bidder's pricing on a price per quality point (PQP) basis.

## Other information

### Description of risks to contract performance

The Authority considers the following to be future risks to contract performance:

Material infrastructure and/or hosting changes, resulting in a change to a hosting location which is not permitted by the Authority or not covered by any offshoring agreement agreed as part of the contract.

A situation wherein the bidder is subject to a merger or acquisition which results in a material change to the approach to contract delivery, for example the resulting organisation no longer suits the Authority's ongoing or future needs or places too much risk on the Authority's existing agreements.

Due to the longer-term nature of the contract and the speed of development and change in this sector, there is a potential risk that the scope of the requirements stated in the contract are not broad enough to have captured any and all future developments and innovations and as such there may be a need to modify the contract in future to ensure that these developments are made available to the Authority as the contract progresses or the Authority risks tie-in to legacy software that will cease to deliver the expected benefit of this procurement, particularly in cases where such software may no longer be supported which



would prevent the bidder from being able to perform its obligations under contract.

## **Applicable trade agreements**

- Government Procurement Agreement (GPA)
- Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

## **Conflicts assessment prepared/revised**

Yes

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## **Procedure**

### **Procedure type**

Competitive flexible procedure

### **Competitive flexible procedure description**

The Authority will procure its Customer Relationship Management opportunity as a Competitive Flexible Procedure (CFP) as set out in the Procurement Act 2023.

The estimated total contract value over the maximum term is £2bn. This figure is an estimate and may not reflect actual spend, which will be predicated on programme delivery.

Detail of the Competitive Flexible process for the procurement is set out below:

The initial stage that will be open to all interested parties is the Conditions of Participation, which will be looking to assess bidders on their technical and economic ability to deliver the contract. The Conditions of Participation will include a scored procurement specific questionnaire and those bidders which can successfully demonstrate the necessary capability will be selected to be taken forward to the next stage.

The Invitation to Submit Initial Tender (ITSIT) will assess bidders on a range of key award criteria including, but not limited to, functional and non-functional requirements, innovation, social value, price, terms and conditions and product demonstrations.

The Authority may choose to utilise product demonstrations as part of the evaluation at this stage with further detail as to how product demos will be scored and evaluated will be communicated as part of the published ITSIT documentation.

Only those bidders which meet the required threshold at initial tender stage shall be put forward to the negotiation phase. Full details of the required threshold will be provided with the tender documents when issued at ITSIT which will set out clear and unambiguous evaluation methodology including pass/fail and scored criteria, minimum score requirements and so on.

The negotiations will enable the Authority to clarify and improve the tenders submitted at ITSIT stage. The process will also enable bidders to develop a more detailed understanding of the Authority's requirements.

As part of the final stage, the Invitation to Submit Final Tender (ITSFT), bidders will have an opportunity to amend their bid based on the output of negotiations and the feedback provided from the ITSIT. The winning bidder from the ITSFT will be the Authorities preferred bidder, and will be awarded the contract, subject to agreement upon contract terms and the completion of any further due diligence which is deemed necessary.

The Authority reserves the right to refine the Award Criteria of the CFP in accordance with Section 24 of the Act.

The Authority also reserves the right to modify the CFP in accordance with Section 31 of the Act.

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## Documents

## Associated tender documents

[Ariba Guidance - Supplier Registration \(SLP\).pdf](#)

[170301 Ariba Supplier Guidance v7.pdf](#)

[HMRC CRM Conditions of Participation Document v1.0.docx](#)

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## Contracting authority

### HM Revenue & Customs

- Public Procurement Organisation Number: PVMW-8599-JZNJ

100 Parliament Street

London

SW1A 2BQ

United Kingdom

Email: [Christopher.edwards@hmrc.gov.uk](mailto:Christopher.edwards@hmrc.gov.uk)

Region: UKI32 - Westminster

Organisation type: Public authority - central government

