



OFFICE OF THE ADVISORY COMMITTEE ON BUSINESS APPOINTMENTS

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BUSINESS APPOINTMENT APPLICATION: Dr Simon Case CVO, former Cabinet Secretary and Head of the Civil Service at the Cabinet Office. Paid commission with Workday, Inc. under your independent consultancy.

1. You sought advice from the Advisory Committee on Business Appointments (the Committee) under the government's Business Appointment Rules for former Crown Servants (the Rules) on taking up a commission with Workday, Inc. (Workday) as an Advisor under your independent consultancy.
2. The purpose of the Rules is to protect the integrity of the government. Under the Rules, the Committee's remit is to consider the risks associated with the actions and decisions made during your time in government service, alongside the information and influence you, as the former Cabinet Secretary, may offer Workday. The material information taken into consideration by the Committee is set out in the annex.
3. The Committee has advised that a waiting period and a number of conditions be imposed to mitigate the potential risks to the government associated with this appointment under the Rules. This is not an endorsement of this appointment in any other respect.
4. The Rules¹ set out that Crown servants must abide by the Committee's advice. It is an applicant's personal responsibility to manage the propriety of any appointment. Former Crown servants are expected to uphold the highest standards of propriety and act in accordance with the 7 Principles of Public Life.

¹ Which apply by virtue of the Civil Service Management Code, The Code of Conduct for Special Advisers, The King's Regulations and the Diplomatic Service Code.

The Committee's consideration of the risks presented

5. The Committee² considered this commission to be broadly consistent with the description of your independent consultancy – which was described as providing advisory services on senior leadership and strategy questions across a range of sectors.
6. Workday is a USA-based on-demand financial management, human capital management, and student information system software vendor. Workday has multiple contracts across the UK government, including the Department for Science, Innovation and Technology (DSIT) and the Cabinet Office. This work is primarily led by DSIT.
7. As Cabinet Secretary and Head of the Civil Service, you had oversight/ broad direction of decisions within the Civil Service. However, you had no involvement in or oversight of Workday's contracts within government departments, nor its relationships across the wider public sector. In November 2023, you met with Workday in relation to the then Prime Minister's AI Safety Summit³. You stated that this was one of a number of meetings you had with a range of technology companies that were interested in understanding more about what the Prime Minister wanted to achieve at that time regarding AI safety and how technology stakeholders could support the summit. It is significant that you were not involved in decisions specific to Workday, as a result of this meeting or otherwise. Therefore, the Committee considered that, despite the significant commercial relationship Workday holds with government departments, the risk that this proposed commission could reasonably be seen for decisions you made in government service is limited.
8. As the former Cabinet Secretary and Head of the Civil Service, you held privileged insight into government's policy, including the various options and wider strategic thinking that were being considered until relatively recently. As such, the Committee considered that there is risk associated with your access to information. The Cabinet Office did not consider you to possess any specific information that is likely to confer an unfair advantage to Workday. It is also relevant that it has been over five months since you left government service, placing a gap between your access to information and taking up this role. In that time, there have been some significant announcements in respect of policy decisions on government's priorities – such as the Spring Statement⁴ and Spending Review⁵.

² This application for advice was considered by Isabel Doherty; Hedley Finn OBE; Dawid Konotey-Ahulu CBE DL; Michael Prescott; and The Baroness Thornton. Sarah de Gay was unavailable.

³ www.gov.uk/government/topical-events/ai-safety-summit-2023

⁴ <https://www.gov.uk/government/topical-events/spring-statement-2025>

⁵ <https://www.gov.uk/government/topical-events/spending-review-2025>

9. As a former senior official working at the heart of government and the civil service, there is a risk that you might be seen to offer unfair access to, and influence within, government. You stated that you have been clear with Workday, and the company has readily accepted, that, as part of your proposed role, you cannot be involved in lobbying the UK government on the company's behalf, nor involved in any contracts or bids relating to the UK government or draw on your knowledge of government to further the company's UK interests. You stated in your application that Workday has agreed that these conditions will be written into your contract and will be binding on both parties – and Workday has confirmed to the Committee that this is the case.

The Committee's advice

10. The Committee determined the risks identified can be appropriately mitigated by the conditions below which were attached to your independent consultancy. These conditions make it clear that you must not make use of privileged information, contacts or influence gained from your time in Crown service to the unfair advantage of Workday under your independent consultancy. It is significant that, as you stated in your application, the conditions will be written into your contract and that Workday wrote to the Committee to confirm it.
11. The conditions below also remind you that you must not make use of privileged insight gained from your ongoing role in wider government as the Independent Chair of the Barrow Delivery Transformation Fund.
12. Taking into account these factors, in accordance with the government's Business Appointment Rules, the Committee advises this commission with **Workday, Inc.** should be subject to the same conditions applied to your independent consultancy:
- a waiting period of six months from your last day in government service;
 - you should not draw on (disclose or use for the benefit of yourself or the persons or organisations to which this advice refers) any privileged information available to you from your time in Crown service – which extends to any other role in which you continue to represent the UK government and its arm's length bodies;
 - for two years from your last day in Crown service, you should not become personally involved in lobbying the UK government or any of its arm's length bodies on behalf of Workday, Inc. (including parent companies, subsidiaries, partners and clients); nor should you make use, directly or indirectly, of your contacts in the government and/or

Crown service to influence policy, secure business/funding or otherwise unfairly advantage Workday, Inc. (including parent companies, subsidiaries, partners and clients);

- for two years from your last day in Crown service, you should not provide advice to or on behalf of Workday, Inc. (including parent companies, subsidiaries, partners and clients) on the terms of, or with regard to the subject matter of, a bid with, or contract relating directly to the work of the UK government or any of its arm's length bodies;
- for two years from your last day in Crown service, you should not become personally involved in lobbying contacts you developed during your time in Crown service in other governments and organisations for the purpose of securing business and investments for Workday, Inc.; and
- for two years from your last day in ministerial office, before accepting any commissions for your independent consultancy and or/before extending or otherwise changing the nature of your commissions, you should seek advice from the Committee – the Committee will decide whether each commission is consistent with the terms of the consultancy and consider any relevant factors under the Business Appointment Rules.

13. The advice and the conditions under the government's Business Appointment Rules relate to your previous role in government only; they are separate from rules administered by other bodies such as the Office of the Registrar of Consultant Lobbyists, the Parliamentary Commissioner for Standards and the Registrar of Lords' Interests⁶. It is an applicant's personal responsibility to understand any other rules and regulations they may be subject to in parallel with this Committee's advice.

14. By 'privileged information' we mean official information to which a minister or Crown servant has had access as a consequence of his or her office or employment and which has not been made publicly available. Applicants are also reminded that they may be subject to other duties of confidentiality, whether under the Official Secrets Act, the Ministerial Code or otherwise.

15. The Business Appointment Rules explain that the restriction on lobbying means that you *'should not engage in communication with government (ministers, civil servants, including special advisers, and other relevant*

⁶ All Peers and Members of Parliament are prevented from paid lobbying under the House of Commons Code of Conduct and the Code of Conduct for Members of the House of Lords. Advice on obligations under the Code can be sought from the Parliamentary Commissioners for Standards, in the case of MPs, or the Registrar of Lords' Interests, in the case of peers.

officials/public office holders) – wherever it takes place – with a view to influencing a government decision, policy or contract award/grant in relation to their own interests or the interests of the organisation by which they are employed, or to whom they are contracted or with which they hold office’.

16. You must inform us as soon as you take up employment with this organisation, or if it is announced that you will do so. You must also inform us if you propose to extend or otherwise change the nature of your role as, depending on the circumstances, it may be necessary for you to make a fresh application.
17. Once the appointment has been publicly announced or taken up, we will publish this letter on the Committee’s website, and where appropriate, refer to it in the relevant annual report.

Isabel Doverly
Interim Chair
ACOBA

Annex – material information

The role

1. You stated this is a commission under your independent consultancy, which provides advisory services on senior leadership and strategy questions. Clients may be in the technology sector, education sector, financial services and charitable sector.
2. Workday is a USA-based on-demand financial management, human capital management, and student information system software vendor. Workday has multiple contracts with the UK government, including a major deal with the ‘Matrix cluster’⁷ of departments. This £144.3 million contract aims to modernize Human Resources and Finance systems across the cluster⁸, including departments like the Cabinet Office and DSIT⁹.
3. You noted this commission as an Advisor involves:
 - supporting the development of business strategy across Workday’s global operations.
 - acting as a mentor and adviser to Workday senior leaders.
 - participating in Workday advisory board meetings.

⁷ The "Matrix cluster" is a grouping of nine UK government departments, designed to standardize and consolidate their back-office functions like HR, finance, and procurement. This cluster is part of the UK government's wider effort to modernize these services through a shared services strategy.

⁸ www.find-tender.service.gov.uk/Notice/031882-2024/PD

⁹ [www.government-transformation.com/transformation/workday-wins-uk-matrix-erp-deal-over-oracle-and-microsoft#:~:text=A%20cluster%20of%20central%20government,\(DBT\)%2C%20and%20others](https://www.government-transformation.com/transformation/workday-wins-uk-matrix-erp-deal-over-oracle-and-microsoft#:~:text=A%20cluster%20of%20central%20government,(DBT)%2C%20and%20others)

4. You stated that you have been clear with Workday, and the company has readily accepted, that, as part of your proposed role, you cannot be involved in lobbying the UK government on the company's behalf, nor involved in any contracts or bids relating to the UK government or draw on your knowledge of government to further the company's UK interests. You stated Workday has agreed that these conditions will be written into your contract and will be binding on both parties.

Correspondence with Workday

5. Workday confirmed in writing its agreement to comply with the Committee's advice. Workday stated that they have agreed with you that they will make adherence to ACOBA restrictions a condition of employment in the contract and therefore binding on both parties:

'Workday is mindful that as a Member of the House of Lords and a former Senior Civil Servant, the Contractor will have obligations both under the Code of Conduct for Members of the House of Lords, and the Advisory Committee on Business Appointments Guidance on Business Appointments for former Crown Servants. For the avoidance of doubt, Workday expects the Contractor to comply with these obligations at all times in the discharge of the Contractor's services for Workday, and for the Contractor to notify Workday immediately if the Contractor believes that any aspect of the Contractor's work for Workday may put the Contractor in potential conflict with them.'

Ongoing role with government

6. You are the Independent Chair of Barrow Delivery Board Barrow Transformation Fund¹⁰, a £200m government package to deepen and develop Barrow's crucial role at the heart of UK national security and nuclear submarine-building, overseen by the Defence Nuclear Enterprise.

Dealings in office

7. You stated you met once with representatives of Workday in 2023 in relation to the Prime Minister's AI Safety Summit. It was one of a number of meetings you had with technology companies who were interested in understanding more about what the Prime Minister wanted to achieve and how technology companies could support the summit. You stated you are unaware if Workday subsequently had any role in the AI safety summit as this sole meeting was your only contact with them.
8. You stated you are aware that Workday has contracts with government. You stated he did not have any involvement in contracts specific to Workday, nor knowledge of what was agreed upon or the value they represent. Further, you

¹⁰ <https://www.gov.uk/government/news/simon-case-takes-leading-role-in-plan-to-transform-barrow>

added that you are unaware of civil servants involved in contractual dealings with Workday or when these discussions occurred.

9. You informed the Committee you were not involved in policy, regulatory or commercial decisions, and you do not hold sensitive information specific to Workday.

Departmental assessment

10. The Cabinet Office confirmed the nature of your interaction with Workday as you stated and that you did not have involvement in decisions specific to Workday during your time as Cabinet Secretary.
11. The Cabinet Office stated Workday holds a number of contracts across government, and some departments also hold subscriptions with Workday for access to their services. This includes the Cabinet Office – the highest contract amount with the Cabinet Office found on Contracts Finder for c.£350,000. Workday was awarded a contract to nine departments, including the Cabinet Office, as part of a deal to provide its services to a cluster of departments. The contract appears to mainly be coordinated by DSIT.
12. The Cabinet Office stated that you held one of the most central and influential roles within the civil service, and would have had broad access to government policy in development and wider strategic thinking which could be perceived to be of assistance to those you work with as part of your independent consultancy. However, the department is not aware of any specific information you were privy to that would likely present an unfair advantage to Workday. The Cabinet Office also noted it is highly unlikely that you:
 - would have known any details regarding Workday's contracts across government, and would not have been involved in their arrangement.
 - would have been privy to information regarding competitors of Workday given the nature of Workday's business, and the Cabinet Secretary's broad and varied responsibilities.
13. The Cabinet Office noted your duty to maintain the confidentiality of any retained knowledge of privileged information of the inner workings of government or knowledge of policy development during your time in Crown service.
14. The Cabinet Office recommended the standard conditions that apply to an independent consultancy apply to appropriately mitigate the risks considered.