Critical Insights

BRIEFING PAPER
CI-BP-2026-005

The decision landscape: what NS4 asks of you, and when

Working backwards from Q4 2028. Every date in this paper is published. The decisions are earlier, cheaper and easier to miss than they look.

PREPARED BY	DATE	COMPANION TO	BASIS
Critical Insights Ltd	4 September 2026	CI-BP-2026-004, Network Services 4: the framework that will carry the ESN transition	Open source only

Key judgements

- **The question of who pays for ESN devices has been answered in public, and the answer is you.** The Home Office's device tender of 12 June 2026 routes routine supply to operational users through call-off contracts under NS4. Central money develops and certifies the devices; local money buys them.
- **The binding decision is a budget decision this autumn, not a procurement decision in 2027.** Working backwards from a Q4 2028 transition start puts device, vehicle-fit and control-room money in the 2027/28 and 2028/29 financial years — the medium term financial plans being drafted now.
- **Three published clocks do not line up.** NS4's initial term ends 17 March 2029, one quarter after mass transition begins. Airwave and the CMA charge control both end 31 December 2029. Transition is due to complete mid-2030. NS4's maximum term ends 17 March 2031.
- **Programme funding is approved for two years, to March 2028.** The Accounting Officer Memorandum of March 2026 records the updated Programme Business Case as approved by Home Office InvestCo on 18 December 2025, "which includes 2 years of funding to March 2028", followed by HM Treasury and Chief Secretary approvals in early 2026 and Accounting Officer approval on 4 March 2026. The approved funding runs out one quarter before Full Voice Service Ready and three quarters before mass transition begins.
- **For suppliers there is one published gate, and it closes at 15:00 on 2 October 2026.** NS4 is not described as an open framework and no re-opening mechanism is published. There is no visible second chance before March 2031.

1 The chain, in one line

NS4 bids close 2 October 2026 → NS4 goes live 18 March 2027 → devices bought 2027 and early 2028 → mass transition from Q4 2028 → Airwave off from 31 December 2029 → transition complete mid-2030.

Every link is published. Read forwards it is a comfortable sequence with years of room in it. Read backwards from Q4 2028 — which is how an organisation actually has to plan — it is not, because the money has to be committed two financial years before the transition it pays for.

THE ASYMMETRY WORTH NOTICING

The expensive decisions are years away and everyone can see them coming. The cheap ones are due within weeks and are the ones most likely to be missed.

- A scope question to the Government Commercial Agency costs an email and is due by **11 September 2026**.
- A budget line in the 2027/28 medium term financial plan costs nothing to insert now and is very expensive to insert later.
- A conversation with your radio and control-room suppliers about their NS4 lot position costs a phone call and is due before **2 October 2026**.

None of these is a procurement. All three shape what can be procured.

2 Decision one — the money, this autumn

The ESN Summary Business Case classifies device purchase and refresh as **non-core**, meaning borne locally. Until June 2026 that classification had no published mechanism attached to it. It now does. The Home Office's ESN End User Devices tender states, verbatim:

"The routine supply of certified devices, accessories and associated services to operational users is expected to be delivered through call-off contracts under GCA's NS4 framework (RM6377)."

That tender is a £15m development and certification framework across four device types, running 1 February 2027 to 31 January 2029. It is not a supply framework. Supply is NS4, and NS4 call-offs are placed and paid for by the buying organisation.

Why autumn 2026 and not later

- Mass transition is targeted to **begin Q4 2028** and to **complete mid-2030** — roughly twenty months to move 107 organisations and around 300,000 users. Airwave took more than five years for 43 police forces.
- Before an organisation can start, it needs devices procured, delivered, configured and distributed; vehicles fitted; control rooms integrated and tested; users trained; and business change done. At force or service scale, device procurement alone is not a six-month job.
- That places buying decisions in **2027 and early 2028**, and therefore the money in the **2027/28 and 2028/29** years.
- Those are the years being written into medium term financial plans **now**. An organisation whose 2027/28 plan carries no ESN device, vehicle-fit, control-room or transition-resource line is not planning to be early in a twenty-month queue.

There is still no published ESN price to a user organisation at any granularity — no per-user, per-device or data tariff — after eleven years and £6.1bn of programme spend. Any figure entering a financial plan this autumn is therefore an organisation's own estimate. That is an argument for putting a considered number in, not for leaving the line out.

3 Decision two — the route, and a gate that closes on 2 October

NS4 is a **£8bn Government Commercial Agency framework, reference RM6377**, with eleven lots. Three of them — 9a Devices, 9b Services, 9c Software — are new and are scoped explicitly to the Emergency Services Network, Airwave, TETRA/ESN dual-mode devices and commercial radio. They were added following discussion with the Home Office programme. Bids close at **15:00 on 2 October 2026**; award is estimated for **4 March 2027**; the framework goes live **18 March 2027**.

FINDING — ONE PUBLISHED WAY IN

The notice describes NS4 as **"Establishes a framework"** — not an open framework. Under section 49 of the Procurement Act 2023 an open framework may be re-opened to admit new suppliers during its life. A standard framework may not, and **no re-opening mechanism is published for NS4**.

The maximum number of suppliers is unlimited, so getting appointed is a compliance-and-quality exercise rather than a contest for a fixed number of places. But a supplier not appointed in March 2027 has, on the published record, no route onto a framework that runs to March 2031 — and for ESN device supply, that framework is the one the Home Office has named.

For a buying organisation this cuts both ways. The suppliers available to you from 2027 to 2031 are being fixed over the next four weeks, by who chooses to bid.

It is worth asking each of your current radio, device, control-room and comms software suppliers a single question this month: *are you bidding NS4, and which lots?* A supplier who is not bidding has told you something important about how you will buy from them after March 2027.

4 The three clocks

Date	Event	Clock
11 Sep 2026	NS4 enquiry deadline	Framework
2 Oct 2026	NS4 bids close, 15:00	Framework
End 2026	CMA Airwave charge control review due	Airwave
18 Mar 2027	NS4 goes live	Framework
30 Jun 2027	Police Digital Service TETRA terminal contract ends	Airwave
17 Jul 2027	Network Services 3 ends	Framework
Mar 2028	End of ESN funding approved by the December 2025 Programme Business Case	Programme
Q2 2028	ESN Full Voice Service Ready	Programme
Q4 2028	**ESN mass transition begins**	Programme
31 Jan 2029	Home Office device development framework ends	Framework
17 Mar 2029	**NS4 initial term ends — first extension decision**	Framework
31 Dec 2029	Airwave extension ends; CMA charge control ends	Airwave
Mid-2030	**ESN transition complete (target)**	Programme
17 Mar 2031	**NS4 maximum term ends**	**Framework**

Three observations, each of them arithmetic

- **The framework's initial term expires one quarter after mass transition begins.** NS4 runs two years to 17 March 2029. Everything past that point depends on the Government Commercial Agency exercising extension options it has reserved the right to apply lot by lot, "by varying durations".
- **The framework's maximum term ends nine months after transition is due to be complete.** If transition runs to time, NS4 covers it with nine months to spare. If it slips by a year, the framework runs out during the transition it exists to serve, and a successor has to be procured while organisations are mid-migration.
- **An earlier notice proposed a term to 2035.** The pipeline notice, last edited 12 December 2025, gave contract dates of 17 February 2027 to 16 February 2035 — eight years — at an estimated £7bn. By the market engagement notice of July 2026 the term was four years and the value £8bn. The published term halved while the published value rose.

ANALYTICAL CAUTION

Section 47 of the Procurement Act 2023 sets a default four-year maximum framework term, with eight years available for defence and security or utilities frameworks or where the nature of the requirement justifies it and the rationale is published. The change from eight years to four is consistent with a decision to run NS4 as a standard framework. **No reason has been published, and none is asserted here.**

Equally, an extension not yet exercised is not an extension refused. The point is not that NS4 will stop in 2029. It is that a user organisation planning a call-off that has to run past March 2029 cannot currently see, in public, whether the framework underneath it will still be there.

5 The exposures, named

- **A route is not a budget.** NS4 makes it easy to spend money you have. It does not find money you have not. The organisations that struggle in 2028 will be the ones that read "the framework is in place" as "this is handled".
- **Programme funding is approved to March 2028.** The March 2026 Accounting Officer Memorandum records approval of two years of funding. Mass transition begins Q4 2028. The approval route and timetable for the funding that covers the transition itself has not been published.
- **The last national TETRA terminal buy is 30 June 2027, and the handover to NS4 is deliberate.** The Police Digital Service contract with Sepura and Motorola Solutions was raised from £50m to £75m excluding VAT and extended six months in April 2026, the modification notice recording that it would be extended "to align with the pending CCS NS4 tender". Its permitted scope includes certified hybrid dual-mode terminals. Any organisation needing terminals that last to mid-2030 has a decision to take before June 2027.
- **Two device categories have gone quiet.** Six device categories were announced in the July 2025 market engagement — including the rugged dual-mode ESN/TETRA device and the intrinsically safe device. The June 2026 tender has four lots and neither of those two appears among them. The dual-mode device is named in NS4 Lot 9a scope. What happened between the two notices is not published, and the dual-mode device is the one that makes a phased transition possible.
- **There is still no published Airwave shutdown date**, and no 2026 publication has been found on the CMA charge control review due by the end of this year. The programme's own completion target sits beyond the end of the price control.

6 What is not on the framework

Two UK operators brought prioritised mobile services to market in the last fifteen months. BT launched **Mission Boost** on EE on 11 June 2026, described in its own words as giving "prioritised access during periods of network congestion or high demand" across national 4G and 5G, for sectors "including critical national infrastructure, responders and transport". VodafoneThree launched **SuperMobile for Business** on 3 September 2026 with a National Business Slice available now, and states that it "will also launch a dedicated National Critical Slice for blue light organisations and critical public services next year".

Both are credible products from serious operators answering a real need, and for a great many operational data tasks prioritisation is genuinely good enough. Choosing one is rational budget management, not a compromise. But two facts sit alongside them: no blue-light customer has been named for either, and **no UK operator has a commercially available mission-critical push-to-talk product**.

FINDING — THE LOT THAT IS NOT THERE

NS4's critical communications lots are scoped to **"Emergency Services Network, Airwave, TETRA and commercial radio"**. Lot 1 is WAN connectivity, Lot 3 voice and unified communications, Lot 5 IoT and connected places.

None of the eleven published lot descriptions uses the words "network slicing", "prioritisation", "prioritised mobile data" or "5G standalone", or refers to mission-critical push-to-talk over commercial cellular. The scope is drawn around the market as it stood, not the market announced in June 2026 and September 2026.

So an organisation that decides prioritised commercial data is the right answer for part of its estate — a decision many will reasonably take — has a question to answer that the published material does not: **which NS4 lot does it buy that under?** The enquiry deadline is 11 September 2026.

7 Questions worth asking, and who to ask

To the Government Commercial Agency, before 11 September 2026

- Which lot covers a commercial prioritised mobile data service bought as an operational service by an emergency service organisation?
- Can NS4 be re-opened to new suppliers during its term? If not, what is the route for a supplier whose product is certified for ESN after March 2027?
- Will the two 12-month extension options be exercised across all lots or lot by lot, and when will buyers know?

- Can call-off terms under the critical communications lots carry a multi-year device refresh, given the framework's maximum term ends in March 2031?

To your own suppliers, this month

- Are you bidding NS4, and for which lots? If not, how will you sell to us after March 2027?
- What is your delivery lead time on dual-mode TETRA/ESN devices at our scale — and what does that make the latest date we can place an order and still start transition in Q4 2028?
- If we buy TETRA terminals before the current national contract ends on 30 June 2027, what is their supported life against a mid-2030 transition target?

To yourselves, before the plan is signed off

- Does our 2027/28 medium term financial plan carry an ESN device, vehicle-fit, control-room and transition-resource line? If not, when is the next opportunity to put one in — and is it before or after the money has to be committed?
- Who in this organisation owns the NS4 relationship, and have they read the lot descriptions?
- If we are not in the first wave of transition, what is our position in a twenty-month national programme, and who has agreed it?

8 Sources

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- Home Office, *March 2026: Emergency Services Mobile Communications Programme Accounting Officer Memorandum*, GOV.UK, published 6 July 2026.
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