Critical Insights

BRIEFING PAPER
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Network Services 4: the framework that will carry the ESN transition

What NS4 is, why three new critical communications lots were added to it, and what it asks of emergency service organisations and their suppliers.

PREPARED BY	DATE	SOURCE DOCUMENTS	BASIS
Critical Insights Ltd	4 September 2026	Find a Tender notices for RM6377 and ESN End User Devices; GOV.UK; operator releases	Open source only

Key judgements

- **NS4 is the route by which emergency service organisations will buy their way onto ESN.** The Home Office's own device tender of 12 June 2026 states that 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 is the clearest published statement yet of who buys, and therefore of who pays.
- **Three new lots — 9a Devices, 9b Services, 9c Software — are scoped explicitly to ESN, Airwave, TETRA/ESN dual-mode devices and commercial radio.** They exist because the Home Office asked for them, and they bring device makers, integrators and specialist software vendors onto a national route most of them have never had.
- **The framework's initial term ends 17 March 2029 — one quarter after ESN mass transition is due to begin.** Its maximum term ends 17 March 2031, nine months after transition is due to be complete. An earlier pipeline notice proposed a term running to February 2035.
- **For suppliers the gate is 2 October 2026 and appears to be a one-off.** NS4 is described as establishing a framework, not an open framework, and no re-opening mechanism is published. A supplier not appointed at award in March 2027 has no published route in.
- **For end-user organisations the binding decision is this autumn, and it is a budget decision, not a procurement one.** A route to market is not a budget line. Working backwards from a Q4 2028 transition start puts device money in the 2027/28 and 2028/29 years — the medium term financial plans being drafted now.

1 What has been published

On **21 August 2026** the Government Commercial Agency — the body Crown Commercial Service became on 1 April 2026 — published the tender notice for **Network Services 4, reference RM6377**. It replaces Network Services 3 (RM6116), which ends on 17 July 2027. Bids close at 15:00 on **2 October 2026**; the enquiry deadline is **11 September 2026**.

Eleven weeks earlier, on **12 June 2026**, the Home Office published its own tender notice for **Emergency Services Network (ESN) End User Devices**. Read together, the two notices describe a division of labour that has not previously been visible in public: the Home Office develops and certifies devices, and user organisations buy them.

2 NS4 in summary

Item	Published position
Reference and authority	RM6377, Government Commercial Agency
Commercial tool	"Establishes a framework" — not an open framework
Total value (estimated)	£8.0bn excluding VAT (£9.6bn including VAT)

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Item	Published position
Lots	Eleven. Lots 1–8 cover WAN, LAN, voice and unified communications, contact centre, IoT and connected places, critical domain services, paging and alerting, and audio visual. Lots 9a, 9b and 9c are critical communications.
Term	18 March 2027 to 17 March 2029, extendable to 17 March 2031. Initial duration two years, with two 12-month extension options; GCA reserves the right to extend lots by varying durations.
Suppliers	Unlimited
Award criteria	Quality 85% / Price 15%, every lot
Call-off award method	Either with or without competition
Management charge	1% of charges invoiced to the buyer under call-off contracts
Key dates	Enquiries 11 September 2026 · bids 2 October 2026, 15:00 · award decision estimated 4 March 2027

Every lot shows the same £8bn value, marked "Framework lot values may be shared with other lots". No lot-level ceiling is published, so the notice gives no indication of how much is expected to flow through the critical communications lots.

3 The three critical communications lots

The notice is unusually explicit about what these lots are for. Each of the three names the networks in scope.

Lot	Scope, in the notice's own words
9a Devices	"Devices including integrated/enabling software, services and accessories... Specifically in scope of this Lot are business needs relating to Emergency Services Network ('ESN'), Airwave network, **TETRA/ESN dual mode devices** and commercial radio devices."
9b Services	"Specialised services as required to **scope, design, build, install, run, maintain and connect** critical communications technologies and solutions... relating to Emergency Services Network ('ESN'), Airwave, TETRA and commercial radio."
9c Software	"Specialised operations software solutions including associated services... relating to Emergency Services Network ('ESN'), Airwave, TETRA, and commercial radio."

All three carry CPV classifications for command and control systems, vehicle location systems and dispatch systems, so control-room and dispatch scope sits inside the critical communications lots rather than only in separate ICCS procurements.

NS3's arrangements for radio — Lot 1b Commercial Radio Capabilities with 14 suppliers and Lot 1c Tactical Radio Systems with 11 — are not carried forward in that form. NS4 replaces them with lots scoped to named networks rather than to radio in general, and adds a software lot that has no NS3 equivalent.

FINDING — WHY THE LOTS EXIST

The three lots were introduced at the request of the Home Office ESMCP team, according to bid-advisory material drawn from the tender pack. The Government Commercial Agency's own agreement page states that they were added "to support the anticipated transition and introduction of the Emergency Services Network" following discussions with the programme, and that NS4 offers "support for organisations moving from the Airwave Network to the Emergency Services Network".

This is not a framework that happens to be useful to emergency services. It is a framework that was reshaped for them.

4 How the Home Office intends devices to be bought

The Home Office's ESN End User Devices tender of 12 June 2026 describes four lots — rugged smartphone (£6m), rugged featurephone (£2.5m), non-rugged smartphone (£2.5m) and fixed vehicle device (£4m) — with a total value of **£15m excluding VAT** and a term of **1 February 2027 to 31 January 2029**. Each lot is for the *"Development of Commercial Off the Shelf (COTS)"* user equipment for use on ESN. It is a development and certification framework.

FINDING — THE SENTENCE THAT ANSWERS THE QUESTION

The notice 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)."**

Three things follow, and all of them are now on the public record rather than a matter of inference:

- The Home Office pays to **develop and certify** ESN devices.
- **User organisations buy them**, from NS4, with their own money.
- The two frameworks are sequenced as a pair — Home Office development starts 1 February 2027, NS4 goes live six weeks later on 18 March 2027.

The ESN Summary Business Case already classified device purchase and refresh as "non-core", meaning borne locally. This is the procurement mechanism that makes that classification operational.

The change of shape since 2025

In July 2025 the same procurement was taken to market as something considerably larger. The preliminary market engagement notice of 23 July 2025 carried an estimated value of **£925m excluding VAT (£1.11bn including VAT)** across six device categories, with a four-year term and extensions reported as running potentially to 2034. The tender that followed a year later is £15m over two years, with four lots, described as development.

The honest reading is not that money has disappeared but that the shape changed: what was scoped in 2025 as a central device supply arrangement has been split, with development retained centrally and supply routed through NS4 — and therefore onto local budgets.

Two of the six device categories announced in 2025 — the rugged dual-mode ESN/TETRA device and the intrinsically safe device — do not appear as lots in the June 2026 tender notice. The dual-mode device is, however, named explicitly in NS4 Lot 9a. Whether those categories were dropped, deferred or handled elsewhere is not published.

5 The term, and what changed between the notices

Three notices have been published against the same procurement identifier. Comparing them is arithmetic on the public record.

Notice	Published / last edited	Value	Contract dates	Term
UK1 Pipeline	17 Apr 2025, ed. 12 Dec 2025	£7bn	17 Feb 2027 – 16 Feb 2035	8 years
UK2 Market engagement	8 Sep 2025, ed. 8 Jul 2026	£8bn	17 Feb 2027 – 16 Feb 2031	4 years
UK4 Tender	**21 Aug 2026**	**£8bn**	**18 Mar 2027 – 17 Mar 2029, ext. to 17 Mar 2031**	**4 years**

Between December 2025 and July 2026 the published framework term **halved, from eight years to four**, while the estimated value **rose from £7bn to £8bn**. A framework running to February 2035 would have covered the whole of ESN transition and the first post-transition device refresh cycle. One ending in March 2031 covers transition — if both extension options are exercised — and nothing beyond it.

ANALYTICAL CAUTION

Under section 47 of the Procurement Act 2023 the default maximum term for a framework is four years, extending to eight for defence and security or utilities frameworks, or where the nature of the goods or services requires it and the authority publishes its rationale. The move from eight years to four is *consistent with* a decision to run NS4 as a standard framework rather than justify a longer one.

That is an inference and should be treated as one. No reason for the change has been published, and none should be asserted.

6 What it means for emergency service end-user organisations

What NS4 does

- **Gives a compliant national route** to buy ESN devices, TETRA devices, dual-mode devices, control room and dispatch products, planning and network management software, cryptographic and logging software, and the professional services to scope, design, build, install, run and maintain any of it.
- **Permits award with or without competition**, so a direct award from a catalogue is available where the framework's objective mechanism supports it. That materially shortens lead time for an organisation that has left it late.
- **Puts device makers, integrators and specialist software vendors on one route**, removing the need to run separate procurements for each.

What NS4 does not do

- **It does not fund anything.** A route to market is not a budget line. Having the framework in place makes it easier to spend money already found; it does not find it.
- **It carries no published price** for anything, at any granularity — consistent with the wider position that no ESN price to a user organisation has ever been published.
- **It does not cover the ESN network service itself**, which is contracted directly by the Home Office. NS4 covers everything around it.
- **On the published lot descriptions it does not obviously cover commercial prioritised mobile data or network slicing** — see section 8.

The dates a user organisation is working to

Date	Event
11 Sep 2026	NS4 enquiry deadline — the last published opportunity to ask GCA a scope question
2 Oct 2026	NS4 bids close, 15:00
Autumn 2026	Medium term financial plan drafting for 2027/28 onwards
End 2026	CMA Airwave charge control review due
1 Feb 2027	Home Office ESN device development framework starts
18 Mar 2027	**NS4 goes live**
30 Jun 2027	Police Digital Service TETRA terminal contract ends
17 Jul 2027	Network Services 3 ends
Mar 2028	End of ESN funding approved by the December 2025 Programme Business Case
Q2 2028	ESN Full Voice Service Ready
Q4 2028	**ESN mass transition begins**
31 Jan 2029	Home Office device development framework ends

Date	Event
17 Mar 2029	**NS4 initial term ends — first extension decision**
31 Dec 2029	Airwave extension ends; CMA charge control ends
Mid-2030	ESN transition complete (target)
17 Mar 2031	**NS4 maximum term ends**

Read forwards, that is a comfortable sequence. Read backwards from Q4 2028 it is not. Before an organisation can start mass transition it needs devices procured, delivered, configured and distributed; vehicles fitted; control rooms integrated and tested; users trained; and business change done. Device procurement at force or service scale is not a six-month job. Realistically the buying decisions land in **2027 and early 2028**, which places the money in the **2027/28 and 2028/29** financial years — the plans being written this autumn.

7 What it means for suppliers and vendors

FINDING — THE GATE IS A ONE-OFF

NS4 is described in the notice as establishing a framework, not an open framework. Under section 49 of the Procurement Act 2023 an open framework can be re-opened to admit new suppliers; a standard framework cannot. No re-opening mechanism is published.

On the face of the notices, **2 October 2026 is the only published way onto a route that runs to March 2031** — and, for ESN device supply, the route the Home Office has named.

- **Unlimited suppliers means the competition is not at framework stage.** GCA has set no cap. Getting appointed is a compliance-and-quality exercise; winning work happens at call-off, where a buyer may award with or without competition. A framework place is necessary and nowhere near sufficient.
- **The three lots widen the supplier base considerably.** Lot 9c — planning and network management software, cryptographic software, logging software — brings vendors into scope who have had no national public sector route at all. Lot 9b's "scope, design, build, install, run, maintain" covers advisory, assurance, integration and measurement work.
- **Barriers are compliance-shaped.** Technical Ability Certificates with minimum contract values, financial viability assessment, Cyber Essentials, carbon reduction plan, modern slavery assessment and insurance minimums. Bid-advisory material reports TAC thresholds of £150k for Lot 9a and £100k for Lots 9b and 9c; those figures are in the tender pack rather than the published notice and should be checked directly.
- **Device vendors have to win both frameworks.** Home Office development and certification runs from February 2027; volume supply runs through NS4. A certified product without a Lot 9a place has no named route to the operational buyer.
- **The preliminary market engagement notice flags NS4 as of particular suitability to SMEs and voluntary, community and social enterprises.**

The handover is deliberate and on the record. The national TETRA terminal contract — Police Digital Service, with Sepura and Motorola Solutions, raised from £50m to £75m excluding VAT in April 2026 — was extended without competition because only those two hold NCSC and Airwave approval, and, in the notice's words, "the existing TETRA Contract will be extended until June 2027 to align with the pending CCS NS4 tender".

8 Where the commercial operator offers fit

Two UK operators have brought prioritised mobile services to market in the last fifteen months, and both are relevant to emergency service data — though neither is a mission-critical voice product.

- **BT launched Mission Boost on EE on 11 June 2026**, the first service in its MissionNet portfolio, described in BT's words as giving "prioritised access during periods of network congestion or high demand... across national 4G and 5G mobile infrastructure", for sectors "including critical national infrastructure, responders and transport". BT says MissionNet "will evolve to incorporate additional capabilities from contact management to applications such as push-to-talk".

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- **VodafoneThree launched Vodafone SuperMobile for Business on 3 September 2026**, anchored by a National Business Slice available now, with named customers in aviation, energy, rail-adjacent logistics and events. Vodafone states that it "will also launch a dedicated National Critical Slice for blue light organisations and critical public services **next year**", providing "priority connectivity and assured performance for first responders".
- **Vodafone MCx**, the mission-critical product built with Airbus Agnet, remains a Germany launch. The most recent Vodafone statement, of 17 June 2026, describes it as rolling out across Europe and gives no UK date.
- **No UK operator has a commercially available MCPTT product**, and no blue-light customer has been named for any of these services.

FINDING — THE LOT THAT IS NOT THERE

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

Nowhere in the eleven published lot descriptions do the terms "network slicing", "prioritisation", "prioritised mobile data", "5G standalone" or mission-critical push-to-talk over commercial cellular appear. NS4's scope is drawn around the market as it stood, not the market the operators announced in June 2026 and September 2026.

That leaves a real and answerable question for any buyer wanting to place a commercial prioritised-data service on a compliant national route: **which lot is it bought under?** The enquiry deadline is 11 September 2026, and the question costs nothing to ask.

9 Implications and what to watch

- **Put the scope question to GCA before 11 September.** Which lot carries a commercial prioritised mobile data service; whether the framework can be re-opened; whether both extension options will be exercised across all lots.
- **Get the line into the medium term financial plan this autumn.** ESN device, vehicle-fit, control-room and transition-resource money for 2027/28 and 2028/29 has to be in the plan being drafted now, not found later.
- **Decide the last TETRA buy.** The Police Digital Service contract ends on 30 June 2027. Any further terminal purchase under it, and its supported life against a mid-2030 target, is a decision for the next nine months.
- **Ask suppliers their NS4 lot position now.** A supplier not bidding by 2 October has no published route to sell after March 2027.
- **Watch for the NS4 award notice**, expected around 4 March 2027, and for the Home Office device framework award.
- **Watch the 17 March 2029 extension decision.** It is the first point at which the framework carrying the transition could stop carrying it, and it falls one quarter after mass transition begins.

10 Sources

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