



SERVICE DEFINITION

Major Projects in Affinitext's Intelligent Document Platform

1 Introduction

The Major Projects in Affinix's Intelligent Document Platform Service (**Service**) is designed to be an essential hub and the key contract & statutory compliance resource to assist contracting government entities and their stakeholders, such as the National Infrastructure and Service Transition Authority (**NISTA**), Scottish Future Trust (**SFT**), Local Partnerships (**LP**), National Audit Office (**NAO**), Public Accounts Committee (**PAC**), government departments, authorities and their industry partners and service providers in exemplar contract management of projects.

Affinix's Intelligent Document Platform (**Platform**) transforms executed contract suites into structured, unified, interactive digital assets, enabling faster understanding, auditable compliance, and better decision-making throughout the project lifecycle.

The Buyer acknowledges that to 'achieve a step change in performance, engineering and construction companies and owners alike need to re-imagine governance, people and technology',¹ which is a restatement of the commonly accepted three-limb formula for successful projects:



A simple truth is that most projects cannot have the very best-skilled or most experienced people in every role; either because they are not available or the project cannot afford them (a reality that has become starker under the ever-growing pressures on organisations to 'do more with less'). The problem is exacerbated by the fact that people move on. When they do, their knowledge and experience are largely lost to the project they were engaged on, let alone captured and shared for the benefit of other projects within an organisation's portfolio. Given the inevitability of people issues, it makes sense to invest in the best tools and processes to ensure a clear understanding of the desired relationships. and of the

¹ KPMG Global Construction Report – 'Make it or break it – Reimagining governance, people and technology in the construction industry' (2017)

complex contracts which bind the parties together, as well as to capture and share knowledge and manage risk and compliance.

The Service is the global market-leading solution for understanding and managing complex contracts, coupled with seamless integration of contract management processes.

The Service is designed for use in contract portfolios where the Buyer wishes to:

- a. ensure exemplary contract management is embedded in the daily way of working across its project portfolio; and
- b. have the option of making its industry partners responsible for establishing and maintaining the Platform for their projects (with the functionality of the Service) and for using Good Industry Practice to establish and maintain task management and knowledge sharing for each Project. It is preferred that the industry partners do this collaboratively with the Buyer and their main subcontractors, in accordance with the principles of ISO 44001.

2 The Service

Affinixtext provides a secure online library of the Buyer's contract suites, making documents easy to find, understand, navigate and validate. The Service is purpose-built for long, bespoke, and frequently amended contracts, where traditional document management or CLM tools struggle to provide 'what is actually in force' at any point in time.

2.1 Contract repository

The Service includes an electronic repository of major project contracts that will support authorities in managing their contracts and help sponsor departments, NISTA, SFT, LP, the NAO and the PAC identify high-risk projects, enabling a more consistent approach across government.²

With the Service, the government can maintain oversight across its major projects, supporting a more consistent and auditable approach aligned with best practices already used by private-sector counterparties.

2.2 Single, fully up-to-date source of truth

Affinixtext consolidates amendments and variations into a single, fully conformed, up-to-date contract view (with clear amendment history at clause level). This removes and provides a dependable baseline for compliance, assurance and handback planning. The PAC has also warned that the absence of complete, digitised, and searchable contracts

² NAO Report 'Managing PFI assets and services as contracts end' (29 May 2020), para 16 e.

undermines effective contract management, preparations for the handback of assets at contract end, and value-for-money assurance.³

As the NAO notes for PFIs:

*'The PFI contract is central to preparing for and managing the expiry process. These contracts are long, complex documents and in most cases, the parties to the PFI contract will have made amendments over time to change service requirements or achieve specific savings... Depending on the number of variations, it can take a considerable amount of time to gather together the PFI contract'*⁴

This builds on its earlier major report on transforming contract management in government, noting that:

- *'systems for maintaining up-to-date versions of contracts remain weak'*⁵, and
- *'we have yet to see a system that shows departments their current contracts including all changes'*⁶

Similarly, the SFT notes that:

*'as a first step the Authority should review the contractual documentation and ensure that it has a full copy of all relevant documents including any amendments and variations.'*⁷

And the PAC has recently emphasised that:

*'one of the underlying principles of the PFI model was its design to be self-monitoring, with the project delivery company responsible for reviewing its own performance and reporting back to the contracting authority. But this self-monitoring should not preclude authorities from having appropriate access to data and information to support their own monitoring of projects to ensure that contractual obligations are being met.'*⁸

³ Ibid., para 30.

⁴ NAO (2020), op.cit., para 3.3

⁵ NAO Report 'Transforming government's contract management' (4 September 2014), Key Finding 9

⁶ Ibid. Key Finding 17

⁷ SFT Report 'PPP Projects Nearing the End of Contract: A Programme Approach' (15 April 2020), para 6

⁸ PAC Report, 'Private Finance Initiative Contracts' (July 2025), para 30

The Service resolves this long-standing issue by providing all stakeholders with access to an online library of up-to-date contracts in Navigable HTML, Simple HTML, or PDF formats, as appropriate. This provides a ‘single version of the truth’ for all stakeholders. Each project is updated with further amendments and variations as they arise during the project and up to expiry.

The Service ensures contracting authorities have organised access to trusted, current contract information.

2.3 Rapid understanding and navigation

Users can search across the contract suite at project or portfolio level and use clause-clause navigation features such as definition tracking and cross-reference linking to move quickly from question to source text, reducing time spent interpreting complex provisions.

2.4 Obligation, entitlement and compliance management

The Service supports paragraph-level tracking of obligations and entitlements, enabling users to evidence compliance, manage risk, and maintain audit-ready records over the life of the contract.

The need for this has long been a concern. The SFT notes that for PFIs:

‘While the Authority is preparing for Handback, it will also need to continue the ongoing contract management of the contract to ensure ongoing service delivery’,⁹ and ‘we would expect that contract managers would monitor and closely manage the contracts in accordance with good practice. This should enable the Authority to achieve the service and standards to which it is entitled, while maintaining a constructive and open relationship with the private sector parties.’¹⁰

Similarly, the NAO notes that:

‘Effective contract management by the public sector can ensure the SPV is being properly held to account and maintenance work is being completed in line with the contract.’¹¹

⁹ SFT (2020), op.cit., para 12.1

¹⁰ Ibid. para 12.5

¹¹ NAO (2020), op.cit., para 2.18

And in its report on contract management, the NAO noted that:

- *'Poor contract management is a long-standing issue'*¹²
- *'Previous attempts to improve contract management have not delivered sufficient change'*¹³
- *'The underlying causes of problems in contract management go beyond poor administration and lapsed awareness' ...*
 - *Government fails to recognise the value of contract management ...*
 - *Senior managers in central government departments have not taken contract management seriously ...*
 - *Senior managers have not demanded visibility over their contracts ...*
 - *Managers have rarely demanded combined portfolio information to scrutinise and challenge operational contracts*
 - *Government as a whole deploys less of its specialist commercial resources on contract management than the private sector ... contract management has been vulnerable to administration cuts and under-investment'*¹⁴
- *'The government will not get value for money from its contracts until it improves contract management.'*¹⁵

The PAC also observed that poor contract management is problematic:

*'Poor contract management is impacting the quality and condition of PFI assets being handed back to the public sector.'*¹⁶

Through AffiniTask, the Service ensures best practice and auditable contractual compliance for PFI contracts. If this is done collaboratively with the industry partners, the level of trust and confidence in the projects is greatly enhanced, which is also important for a smooth, successful handback on contract expiry.

2.5 Knowledge capture

The Service can include contract management and handback guidance, templates, and lessons learned. Users can capture and share knowledge against relevant clauses, making

¹² NAO (2014), op.cit., Key Finding 10

¹³ Ibid. Key Finding 11

¹⁴ Ibid. Key Finding 12

¹⁵ Ibid. Key Finding 20 (Value for Money Conclusion)

¹⁶ PAC (2025), op cit., conclusions and commendations, 6

personal expertise reusable corporate knowledge. Analysis Track features, etc., assist in both effective contract management and a smooth handback process.

2.6 Collaborative and innovative working

The Service enables collaborative working among all stakeholders and is recognised as exemplary industry practice. This is highly valuable because collaboration is a key factor in the success of PFI handback.

In addition, Affinitext is:

- ISO 44001 certified (with the Ministry of Defence (**MoD**) and the Institute for Collaborative Working (**ICW**) as its relationship partners)
- The first SME globally to achieve ICW's Leading Edge Accreditation.

The Service supports the principles of the ISO 44000 collaborative working and ISO 56000 innovation management standards and guidance suites.

2.7 Integration with other technologies

The Service is designed to integrate seamlessly with other technologies relevant to successful handback, such as:

- Asset and condition registers
- CAFM systems
- Risk Registers
- Financial Models

2.8 Seamless integration with your consultants and advisers

The Service is designed for ease of use by your consultants and advisers, providing unlimited users and usage to enable them to deliver their services quickly, cost-effectively, and with confidence.

3 The Affinitext Intelligent Document Platform (Platform)

The Service is delivered via the Platform. The Platform is modular, with AffiniDocs as its core capability and additional optional modules.

3.1 AffiniDocs (Core module)

- Transforms executed contract suites into structured, interactive, digital contract assets, delivered in Navigable HTML, Standard HTML and/or PDF formats as appropriate.
- Provides a single source of truth by consolidating amendments and variations into the current ("live") contract position, with amendment history retained.
- Delivers 99.5% digitisation accuracy in document conversion.

- Enables precise navigation through clause-to-clause linking and pop-up definitions (where delivered in Navigable HTML).
- Provides advanced search across documents and portfolios.
- Supports obligation and compliance workflows, including tasking obligations and attaching evidence at paragraph level for audit-ready compliance.
- Enables knowledge capture and sharing against clauses, including use of Affinixtext's Analysis Track functionality.

3.2 AffiniTask (Optional module)

AffiniTask (AI-assisted, human-assured) automates obligation tracking by turning key contractual clauses into clear, actionable tasks. It streamlines compliance workflows, reduces the need for intensive manual clause-by-clause review, and makes ongoing contract administration and compliance simpler, faster, and more reliable.

3.3 AffiniTag (Optional module)

AffiniTag (AI-assisted, human-assured) streamlines contract management by applying structured metadata to contracts—enabling fast, accurate search, filtering, and portfolio-level reporting. It helps organisations manage large contract libraries with greater speed and precision, making it easier to locate specific provisions, segment contracts by key attributes, and surface insights across the portfolio.

3.4 AffiniAI (Optional module)

AffiniAI, designed to be your trusted GenAI legal assistant, revolutionises contract interrogation and performance management by delivering real-time insights and outputs, making contract management more efficient and intuitive.

Critically, every answer is designed for validation: users can immediately verify AffiniAI's outputs against the underlying contract text through precise, clause-level navigation (including links and cross-references), ensuring confidence in decisions and reducing the risk of unverified AI responses.

4 Technical requirements

The Buyer requires a reasonable internet connection and a modern, vendor-supported browser (e.g., Chrome, Edge, Safari or Firefox). The Service is accessed via HTTPS. Optional single sign-on (SSO) can be configured where required.

5 Security, accreditation and compliance

Affinixtext operates an ISO/IEC 27001-certified information security management system (ISMS), holds Cyber Essentials and Cyber Essentials Plus certifications, and has Ministry of Defence (OFFICIAL SENSITIVE) accreditation.

Data is protected by encryption in transit and at rest, role-based access controls, and monitored operations.

6 Onboarding, Buyer responsibilities, training and support

6.1 Document intake and conversion

The Buyer provides the executed contracts and all amendments/variations required for the Service. Affinixtext arranges secure transfers via either a Buyer-provided secure SharePoint link or an Affinixtext-managed secure NextCloud portal, as appropriate. Affinixtext then converts and consolidates the documents into the Platform.

6.2 Platform setup

Affinixtext configures the Platform, user roles and permissions, and any portfolio organisation required by the Buyer's governance model.

6.3 Training and support (included)

- A named Account Manager is provided as the single point of contact for delivery, training, support and technical queries.
- Regular online training is included, covering administrator and end-user workflows and periodic refresher sessions.
- Support is provided via web chat and email/ticketing during business hours.

6.4 Optional services (additional cost)

- Onsite training and workshops (e.g., role-based training, train-the-trainer, portfolio rollouts).
- Customer-specific integrations and bespoke API/data exchange development (where required).

7 Service constraints and service levels

Planned maintenance and upgrades are scheduled in advance, typically outside business hours where practicable. The Service guarantees 98% availability outside planned improvements/upgrades.

8 Backup, restore and disaster recovery

Affinixtext performs regular backups of platform data and follows tested restore procedures. High availability and resilience are provided through the hosting platform and operational monitoring; detailed data centre resilience information is available on request.

9 Data and deployment

- Hosting: Multi-tenant hosted environment on Rackspace UK (Crawley), unless otherwise agreed.
- Data residency: UK for this Service.
- Cloud model: Hosted cloud service.

10 Utilisation monitoring and reporting

Usage reporting is available to help Buyers understand adoption and utilisation trends. Operational monitoring and alerting support service management and incident response.

11 Pricing and invoicing

Pricing is in accordance with the applicable G-Cloud Pricing Document. Invoices are issued upon order and are payable in accordance with the Call-Off Contract.

12 Termination

Affinitext provides a simple and quick exit process. Upon cessation of the Service, all documents and Buyer data are returned in accordance with the Call-Off Contract. Contract content is stored in industry-standard XML; Buyer-generated outputs can be exported in formats such as Word, PDF and/or XML as appropriate. Following exit, Affinitext will purge and destroy Buyer data from Affinitext systems in accordance with contractual requirements and applicable law.