SERVICE DEFINITION

PFI/PPP Projects in Affinitext's Intelligent Document Platform

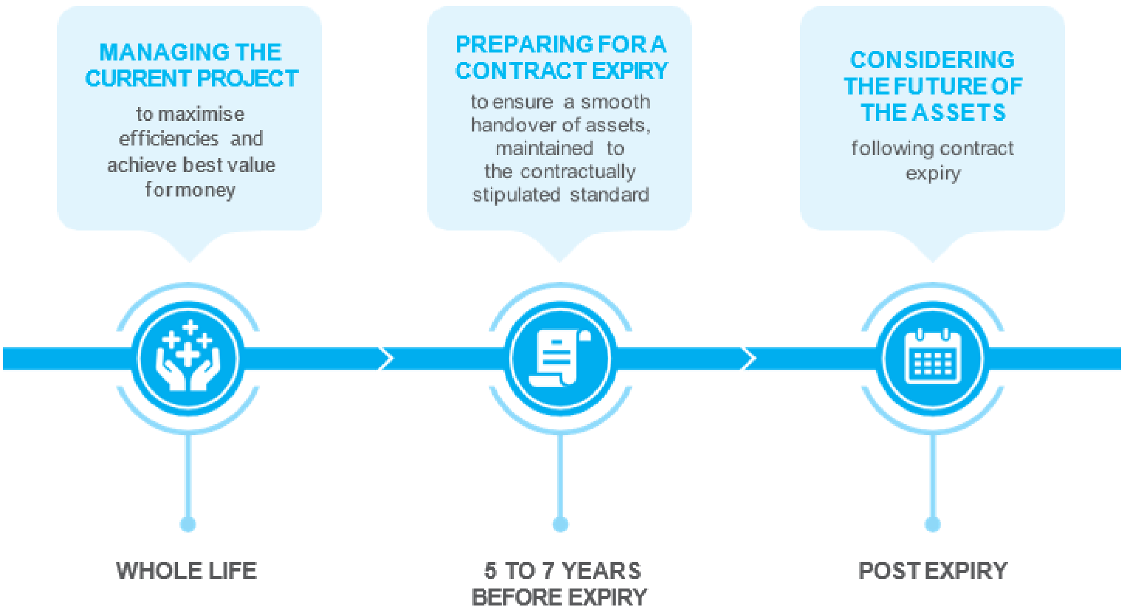
1 Introduction

The PFI/PPP Projects in Affinitext's Intelligent Document Platform Service (**Service**) is designed to simplify the understanding and management of complex PFI/PPP contracts, post-execution, and to enable contracting authorities and their stakeholders to prepare confidently for contract expiry and handback.

The National Audit Office (**NAO**) has highlighted that public bodies are due to pay £136 billion in charges up to 2052–53 for all 665 ongoing PFI contracts, and that half of these contracts are set to expire within the next decade—yet many public bodies remain underprepared for expiry.[1]

Affinitext'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 Service supports three concurrent workstreams, which run through the operational phase and the period leading to expiry:



The Service can be deployed for a single project or across a portfolio and can be used by authorities, sponsor departments, advisors, and (where permitted) by private-sector counterparties to support collaborative working.

1 NAO, 'Lessons learned: private finance for infrastructure' (March 2025), paras 4.18–4.20.

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2 The Service

Affinitext provides a secure online library of the Buyer's contract suite, 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 PFI contracts that will support authorities in managing their contracts and help sponsor departments, National Service & Infrastructure Transition Authority (**NISTA**), Scottish Futures Trust (**SFT**), and Local Partnerships (**LP**) identify high-risk projects, enabling a more consistent approach across government.[2]

The Public Accounts Committee (**PAC**) has recommended stronger central support and specialist capability to help authorities assess asset condition and use contractual mechanisms ahead of expiry and handback.[3]

With the Service, the government can maintain oversight across its PFI/PPP portfolio, 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

Affinitext 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 undermines effective contract management, preparations for the handback of assets at contract end, and value-for-money assurance.[4]

As the NAO notes:

> ***'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***

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

3 PAC Report 'Government's use of private finance for infrastructure' (Thirty-Ninth Report of Session 2024–25, HC 821, July 2025), conclusions and recommendations (central support/capability for expiry and handback).

4 Ibid., para 30.

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achieve specific savings… Depending on the number of variations, it can take a considerable amount of time to gather together the PFI contract' [5]

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'* [6] *, and*
- *'we have yet to see a system that shows departments their current contracts including all changes'* [7]

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.' [8]

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.' [9]

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.

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5 NAO (2020), op.cit., para 3.3

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

7 Ibid. Key Finding 17

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

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

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:

> *'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',* [10] *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.'* [11]

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.'* [12]

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

> - *'Poor contract management is a long-standing issue'* [13]
> - *'Previous attempts to improve contract management have not delivered sufficient change'* [14]

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10 SFT (2020), op.cit., para 12.1

11 Ibid. para 12.5

12 NAO (2020), op.cit., para 2.18

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

14 Ibid. Key Finding 11

- *'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'* [15]
- *'The government will not get value for money from its contracts until it improves contract management.'* [16]

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.'* [17]

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 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.

15 Ibid. Key Finding 12
16 Ibid. Key Finding 20 (Value for Money Conclusion)
17 PAC (2025), op cit., conclusions and commendations, 6

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 Affinitext'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

Affinitext 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. Affinitext arranges secure transfers via either a Buyer-provided secure SharePoint link or an Affinitext-managed secure NextCloud portal, as appropriate. Affinitext then converts and consolidates the documents into the Platform.

6.2 Platform setup

Affinitext 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

Affinitext 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.