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Tender

YPO 1253 - SUPPLY OF CRM SOLUTION FOR YPO AND WIDER PUBLIC SECTOR

Yorkshire Purchasing Organisation
THE ASSOCIATION OF NORTH EAST COUNCILS LIMITED

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

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Scope

Reference

001253

Description

YPO are looking for a Supplier to be appointed onto a Contract (Lot 1) following a Competitive Tendering Procedure for the provision of a CRM Solution, which will serve YPO internal requirements only.

In addition to the above, YPO and NEPO are looking for Suppliers to be appointed onto a Framework Agreement (Lot 2) following a Competitive Tendering Procedure for the provision of CRM Solutions for the Wider Public sector. The Framework is designed to meet the needs of all public sector Contracting Authorities.

For the Framework solution YPO is the lead Public Sector Buying Organisation (PSBO) working in collaboration with NEPO (The Association of North East Councils Limited trading as the North East Procurement Organisation) as a group of Public Sector Buying

Organisations (PSBOs).

Estimated Contract Value (Lot 1): The Contract has an estimated value of between £2,000,000 - £4,000,000 inclusive of VAT for the maximum life of the Contract (10 years). All references to values and/or volumes of business are for guidance only and there is no guarantee of any business. Lot 1 is for YPO only.

Estimated Framework Value (Lot 2): As this is a new Framework to YPO the total spend is unknown however, considering YPO and NEPO's existing customer base it is anticipated to be approximately £60,000,000 inclusive of VAT for the maximum life of the Framework (4 years). This is the total spend figure which would be broken down into separate orders. The Framework estimated value is based on the probable sum based on the maximum estimated value, inclusive of VAT, of all the Call-off Contracts envisaged for the total term of the Framework. The Framework will be available nationally for contracting authorities to call off.

Commercial tool

Establishes a framework

Total value (estimated)

- £64,000,000 including VAT

Above the relevant threshold

Main procurement category

Services

Additional procurement category

Goods

CPV classifications

- 72212445 - Customer Relation Management software development services

Not the same for all lots

Contract locations, contract dates and options are shown in Lot sections, because they are not the same for all lots.

Lot 1. Lot 1 - Single CRM Solution for YPO

Description

YPO are looking for a Supplier to be appointed onto a Contract (Lot 1) following a Competitive Tendering Procedure for the provision of a CRM Solution, which will serve YPO internal requirements only.

Lot value (estimated)

- £4,000,000 including VAT

Framework lot values may be shared with other lots

Contract dates (estimated)

- 6 February 2026 to 5 February 2031
- Possible extension to 5 February 2036

- 10 years

Description of possible extension:

The Contract will cover the period from 6th February 2026 to 5th February 2031 with two options to extend for an additional 36 months and 24 months. The first decision to extend the Contract period will be taken by the end of October 2030 and will be dependent on satisfactory completion of all aspects of the Contract to date, the current market conditions for and YPO's internal contracting structures. The maximum Contract period will therefore be 10 years, from 6th February 2026 to 5th February 2036 (subject to an annual review, incorporating price re-establishment and KPI performance).

Options

The right to additional purchases while the contract is valid.

Any resulting Contract shall be deemed to cover any item that can be supplied by the successful Tenderer(s) over the life of the Contract within the scope of CRM Solutions.

Contract locations

- UKE45 - Wakefield

Same for all lots

CPV classifications are shown in the Scope section, because they are the same for all lots.

Lot 2. Lot 2 - CRM Software Solution for Wider Public Sector

Description

YPO and NEPO are looking for Suppliers to be appointed onto a Framework Agreement (Lot 2) following a Competitive Tendering Procedure for the provision of CRM Solutions for the Wider Public sector. The Framework is designed to meet the needs of all public sector Contracting Authorities

Lot value (estimated)

- £60,000,000 including VAT

Framework lot values may be shared with other lots

Contract dates (estimated)

- 6 February 2026 to 5 February 2027
- Possible extension to 5 February 2030
- 4 years

Description of possible extension:

The Framework Agreement will cover the period from 6th February 2026 to 5th February 2027 with two options to extend for an additional 12 months and 24 months. The first decision to extend the Framework period will be taken by the end of October 2026 and will be dependent on satisfactory completion of all aspects of the Framework Agreement to date, the current market conditions for this category and YPO's contracting structures. The maximum Framework Agreement period will therefore be 4 years, from 6th February 2026 to 5th February 2030 (subject to an annual review, incorporating price re-establishment and KPI performance).

Options

The right to additional purchases while the contract is valid.

Any resulting Framework and Call-off Contract shall be deemed to cover any item that can be supplied by the successful Tenderer(s) over the life of the Framework and Call-off

Contract within the scope of CRM Solutions.

Contract locations

- UK - United Kingdom

Same for all lots

CPV classifications are shown in the Scope section, because they are the same for all lots.

Framework

Maximum number of suppliers

Unlimited

Maximum percentage fee charged to suppliers

1%

Further information about fees

Retrospective Rebate of 1% will be payable on all business transacted under the Framework (Lot 2)

Framework operation description

Customers can call-off the Framework using either a competitive selection process or an Award without competition.

Award without competition: The following objective mechanism for supplier selection, shall be applied 100% to the Cost Criteria to determine best value for money.

The Contracting Authority must undertake a desktop analysis to determine the Provider meets their statement of requirements and evidence best value for money. This desktop analysis should include:-

- o Tenders Response to the Pricing Schedule
- o Tender Cost Quality Responses which cover the Providers costing methodology, discounts, switching/exit costs.
- o Supplier Price List showcasing the scopes of products and services the Provider can deliver under Lot 2 to meet customer requirements and at what cost.
- o Total cost of ownership evaluation

The Supplier Price List should showcase the live products and services which the Supplier can provide under the scope of Lot 2 with a capped maximum price and relevant information, to be available to Contracting Authorities to buy using an Award without Competition mechanism.

If the customer calling off the framework cannot identify best value for money, based on the Framework evaluation, because their requirements are bespoke, or the customer wishes to re-open competition then the OCA or YPO will run a Competitive Selection Process instead.

Competitive Selection Process: The mechanism for Supplier selection under a Competitive Selection Process will be as follows:

- The Customer will identify their Statement of Requirements and all Suppliers awarded to Lot 2 (Framework) only will be invited to compete in the process.
- Contracting Authorities are permitted to undertake a Single or Multi-stage Competitive Selection Process and will be allowed to stipulate Conditions of Participation and Mandatory Requirements to refine those set out for framework assessment and define them specific to their Call-Off requirement provided that they do not contradict Conditions of Participation and/or Mandatory Requirements of the Framework. These conditions and requirements must be a proportionate means of ensuring that Suppliers who are invited to compete have the legal, financial, technical and professional capacity and ability to

perform the Call-off Contract. The customer may require Suppliers to provide evidence in order to verify whether a particular condition of participation and/or Mandatory Requirement is satisfied, e.g. relevant accreditations. If the Supplier is unable to satisfy the customers Conditions of Participation and/or Mandatory Requirement, they may be excluded from the Competitive Selection Process.

- Suppliers will be required to submit "sealed bids" via the customer's choice of e-tendering site in response to the Customer's tender. The Award Criteria for such competitions are specified in table below. Each time the customer runs a Competitive Selection Process; the award decision will be based on the below criteria:

Conditions of Participation: Customers will be allowed to include conditions of participation and Mandatory Requirements to refine those set out for framework assessment.

Cost: Permitted range 10%-80%. Customers will have the option to amend weightings at the Further-competition stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage.

Non-Cost (Quality): Permitted range 10%-80%. Customers will have the option to amend weightings at the Further-competition stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage.

Social Value and Sustainability: Permitted range 10%-30%. Customers will have the option to amend weightings at the Further-competition stage to suit their internal needs/policies. Customers may reopen this criterion in full, or scores may be carried through from the Framework Establishment stage.

Customers may flex within the permitted ranges the stated above, depending on whether the customer requirement is Cost, Non-Cost (Quality) or Social Value/Sustainability driven.

Where Contracting Authorities flex the Award Criteria within the ranges stated above to suit their individual requirements then the overall Award Criteria must total 100%.

YPO recommend that at least 2 award criteria are re-opened if a Contracting Authority wish to flex the scoring methodology within the permitted ranges at Competitive Selection stage.

Customers will apply a scoring scale of their own choosing to evaluate responses to the above criteria. The exact scoring scale will be determined at the Call-off Competitive Selection Process stage and made clear within those documents.

At the Competitive Selection stage customers will publish their own specific requirements by reference to the above award criteria, to which Suppliers will be expected to respond. These requirements may include, but not limited to:

- ? particular delivery timescales;
- ? budgetary requirements
- ? particular invoicing arrangements and payment profiles;
- ? particular associated services specific to the Lot being called off from, e.g., installation, maintenance, and training;
- ? re-establish pricing;
- ? Social Value in relation to the Call-off Contract and/or compliance with Social Value measurement tool

It is intended that most Call-off's using the Competitive Selection Process under this Framework will be conducted using a one stage process, however Contracting Authorities have the option to incorporate one or more of the following elements into their Single, or multistage Competitive Selection Process:

- ? Conditions of Participation and/or Mandatory Requirements;
- ? Reverse electronic auctions;
- ? Site visits;
- ? Product demonstrations/presentations;
- ? Open dialogue
- ? Negotiation Meetings
- ? Multiple tendering stages

The exact Competitive Selection Process will be described by the Contracting Authority in the Call-off Competitive Selection Process documents.

For Competitive Selection Process Call-offs, a mechanism for determining price payable will be as follows:

Contracting Authorities will provide a Pricing Schedule at the Competitive Selection

Process stage, which all participating Suppliers will be required to complete and return as part of the "sealed bid" process.

It is expected that pricing will be evaluated by reference to individual Contracting Authority requirements and on a bulk basis where Suppliers must bid for all lines in order to be considered.

At the Competitive Selection Process stage pricing will be evaluated using methodology stated in the procurement documents for this framework. However, Contracting Authorities have an option to use alternative methodologies, provided that it is described in the Call-off Competitive Selection Process competition documents.

Award method when using the framework

Either with or without competition

Contracting authorities that may use the framework

<https://www.ypo.co.uk/about/customers/permissible-users>

<https://www.nepo.org/associate-membership/permissible-users>

Contracting authority location restrictions

- UK - United Kingdom

Participation

Legal and financial capacity conditions of participation

Lot 1. Lot 1 - Single CRM Solution for YPO

Please refer to the procurement documents

Lot 2. Lot 2 - CRM Software Solution for Wider Public Sector

Please refer to the procurement documentation

Technical ability conditions of participation

Lot 1. Lot 1 - Single CRM Solution for YPO

Please refer to the procurement documents

Lot 2. Lot 2 - CRM Software Solution for Wider Public Sector

Please refer to the procurement documentation

Particular suitability

Lot 1. Lot 1 - Single CRM Solution for YPO

Lot 2. Lot 2 - CRM Software Solution for Wider Public Sector

- Small and medium-sized enterprises (SME)
- Voluntary, community and social enterprises (VCSE)

Submission

Enquiry deadline

15 July 2025, 11:59pm

Submission type

Requests to participate

Deadline for requests to participate

28 July 2025, 9:00am

Submission address and any special instructions

<https://procontract.due-north.com/register?ReadForm>

Tenders may be submitted electronically

Yes

Languages that may be used for submission

English

Award decision date (estimated)

26 January 2026

Recurring procurement

Publication date of next tender notice (estimated): 6 February 2029

Award criteria

Lot 1. Lot 1 - Single CRM Solution for YPO

Name	Description	Type	Weighting
System Functionality	<p>It is intended that System Functionality Award Criteria will be broken down as follows:-</p> <ul style="list-style-type: none"> System Integration 15% Marketing and Sales 20% Customer Account Management 20% User Experience 15% Customisation 15% Dashboards 15% <p>YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	Quality	20%

Name	Description	Type	Weighting
System Demonstrations	<p>There will be 10 user stories that suppliers will need to demonstrate within a live environment. Each user story will have an equal weighting of 10% each. This element of the competitive flexible procedure will be evaluated at Stage 3 and the results of this stage combined with the scores achieved for the rest of the criterion at Stage 2 for those suppliers shortlisted to Stage 3 to determine the most advantageous tender. Please note YPO reserves the right to refine the User Stories and/or scoring methodology prior to the System Demonstration stage (Stage 3) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders.</p>	Quality	20%

Name	Description	Type	Weighting
Social Value and Sustainability	<p>It is intended that the Social Value and Sustainability Award Criteria will be broken down as follows:- YPO Social Value Themes 1 and 4 = 50% YPO Social Value Theme 5 = 30% Modern Slavery = 20% YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	Quality	20%

Name	Description	Type	Weighting
Cost	Suppliers are required to complete the Pricing Schedule giving Quotes against YPO requirements This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure YPO reserves the right to refine award criteria and any sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders.	Cost	15%

Name	Description	Type	Weighting
Implementation and Contract Management	<p>It is intended that the Implementation and Contract Management Award Criteria will be broken down as follows:- Training 30% Implementation 50% Contract and Relationship Management 20%</p> <p>YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	Quality	15%

Name	Description	Type	Weighting
IT Security and Support	<p>It is intended that the IT Quality Security and Support Award Criteria will be broken down as follows:-</p> <p>Infosec and BCDR 40% Use of AI 25% System Scalability 35% YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	IT Quality	10%

Lot 2. Lot 2 - CRM Software Solution for Wider Public Sector

Name	Description	Type	Weighting
Non-Cost	<p>It is intended that Non-Cost Award Criteria will be broken down as follows:- Training 10% Implementation 25% System Integrations 25% Infosec and BCDR 25% Contract and Relationship Management 10% Use of AI 5% YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	Quality	65%

Name	Description	Type	Weighting
Social Value and Sustainability	<p>It is intended that the Social Value and Sustainability Award Criteria will be broken down as follows:- YPO Social Value Themes 1 and 4 = 40% YPO Social Value Theme 5 = 40% Modern Slavery = 20% YPO reserves the right to refine award criteria and sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders. This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure</p>	Quality	20%

Name	Description	Type	Weighting
Cost	Suppliers are required to complete the Pricing Schedule providing Quotes against YPO requirements. This element will be worth 40% In addition, Suppliers are also to detail the cost management approach. This element will be worth 60% This criterion will be assessed at Stage 2 of the Competitive Flexible Procedure YPO reserves the right to refine award criteria and any sub-criteria prior to Tenders stage (Stage 2) as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders.	Cost	15%

Other information

Description of risks to contract performance

YPO has identified the following potential risks affecting this Contract and Framework:

YPO Contract (Lot 1) specific risks -

- **Total Cost of Ownership:** Due to complexity and non-uniformity of IT systems pricing structures, and the need for the successful Supplier to make recommendations at the Contract live stage with regards to best practices and system functionality to maximise system utilisation and enhancement of processes, it is a known risk that Contract spend may exceed estimated total value. To mitigate this risk YPO, included a contingency, allowing to procure any additional functionality, integration features, modules, services or similar, without the need to retender.
- **Nature of the Market:** The Software market is fast evolving which may see a change of scope in the nature of the CRM solution, such as additional functionality, new modules and advances in AI technology, which is unknown at this time. To mitigate this risk YPO have made the specification wide, however on the introduction of new solutions, these may not be covered under the current specification.

Framework (Lot 2) specific risks -

- **Total Cost of the Framework:** Due to the complexity and non-uniformity of Contracting Authority customer solutions and CRM integration with varying third party solutions, the costs may vary widely between Call-offs, with the potential of Framework spend nearing or exceeding estimated total value. To mitigate this risk YPO have researched estimated spend in the market and included a surplus.
- **Nature of the Market:** The Software market is fast evolving which may see a change of scope in the nature of the CRM solution, such as additional functionality, new modules and advances in AI technology, which is unknown at this time. To mitigate this risk YPO have made the specification wide, however on the introduction of new solutions, these may not be covered under the current specification.

Where the relevant, conditions under Schedule 8 of the Act are satisfied, the modification of the Contract/Framework to remedy the identified risks would be treated as a permitted Contract modification.

Conflicts assessment prepared/revised

Yes

Procedure

Procedure type

Competitive flexible procedure

Competitive flexible procedure description

The competitive flexible procedure for Lot 1 - Single CRM Solution for YPO which is the contract lot will be conducted in 3 stages:-

Stage 1: Invitation to Participate including Shortlisting Questions

Stage 2: Invitation to Submit Tender

Stage 3: System Demonstrations

The competitive flexible procedure for Lot 2- CRM Solutions for Wider Public Sector which is the framework lot will be conducted in 2 stages:-

Stage 1: Invitation to Participate

Stage 2: Invitation to Submit Tender

Lot 1 down selection process:

The Invitation to Participate Stage (Stage 1) requires suppliers to meet all of the conditions of the Procurement Specific Questionnaire (PSQ), Conditions of Participation and Mandatory Requirements together with shortlisting questions to which all Tenderers are required to respond to and return in accordance with the proposed timetable in the Procurement documents.

YPO will invite a maximum of 2 Tenderers providing the same CRM system to the Invitation to Submit Tenders stage (Stage 2). All shortlisted Bidders must pass Procurement Specific Questionnaire, Conditions of Participations and Mandatory Questions. Tenders will be grouped into system brands Tenderers put forward within their submission. In each system brand category YPO will then select up to 2 top scoring Providers in each group from the shortlisting questions.

- YPO reserves the right to take through the Tenderer (in each group) with the 3rd highest ranking if its score is within (i.e. no more than) 5 percentage points of the second highest ranking score.

- If two or more Providers in the same group have the same top two score, all will be taken through to the next stage
- In the case where YPO take through more than two Providers because of a tie in scores, the next Provider being within 5 percentage points will not be shortlisted.

YPO will invite a maximum of 1 Tenderers of each CRM system put forward to the System Demonstrations stage (Stage 3). Tenders will be grouped into the system brands they are submitting. While Invitation to Participate stage allowed for unlimited system groups, at Invitation to Submit Tender stage, YPO will only shortlist the 4 highest scoring CRM systems across all groups. This means that only Providers with highest scores across all groups will be shortlisted. If a Provider with the highest score is selected from a particular group, YPO will not select any more Providers from this particular group. Additional information about the shortlisting mechanism are included below:

- YPO reserves the right to take through the Tenderer with the fifth highest ranking (additional system brand) if its score is within (i.e. no more than) 5 percentage points of the fourth highest ranking score.
- If two or more Providers ranked fourth across all groups, have the same score, YPO will take through the Provider with the highest Award Question score for Implementation within the Implementation and Contract Management Award Criterion.
- In the case where YPO takes through more than four Providers because of a tie in scores, the next Provider being within 5 percentage points will not be shortlisted.

All shortlisted suppliers that procedure to Stage 3 will have the Award Criteria Scores combined with the scores from the system demonstration stage to determine the most advantageous tender.

Lot 2 (Framework) down selection process:

All Tenderers who meet the minimum and mandatory requirements will be invited to the Invitation to Submit Tenders stage (Stage 2). This includes meeting all of the conditions of the Procurement Specific Questionnaire (PSQ), Conditions of Participation and Mandatory Requirements to which all Tenderers are required to respond to and return in accordance with the proposed timetable in the Procurement documents. Please note there are no shortlisting questions for Lot 2.

All suppliers who proceed to Stage 2 Invitation to Submit Tender Stage will be required to respond to all Award Criteria Questions. Providers will need to meet the minimum score criterion of 40% out of 65% for the Non-cost award criterion to be successful.

Providers who fall below the minimum threshold score will be rejected. All providers who

meet the minimum threshold score for Lot 2 and respond to all question will be awarded to the framework. Providers bidding for Lot 2 only do not need to participate in the System Demonstrations stage.

Full details of the down selection of suppliers at each stage for each Lot can be found in the procurement documentation.

YPO reserves the right to refine award criteria, sub-criteria and evaluation methodology prior to Tenders stage (Stage 2) and System Demonstration Stage (Stage 3) as relevant as set out in the procurement documentation. The exact details will be issued at the later stages; however, any refinements will only be made if they do not violate fair treatment of all bidders.

Documents

Associated tender documents

<https://procontract.due-north.com/register?ReadForm>

Access to the Procurement Documents can be found at <https://procontract.due-north.com/register?ReadForm>

Contracting authorities

Yorkshire Purchasing Organisation

- Public Procurement Organisation Number: PMRV-4748-MNJV

41 Industrial Park

Wakefield

WF2 0XE

United Kingdom

Email: contracts@ypo.co.uk

Region: UKE45 - Wakefield

Organisation type: Public authority - sub-central government

THE ASSOCIATION OF NORTH EAST COUNCILS LIMITED

- Companies House: 05014821
- Public Procurement Organisation Number: PYVX-2132-JNMM

Northern Design Centre

Gateshead

NE8 3DF

United Kingdom

Email: cdpnepoteam@nepo.org

Website: <http://www.nepo.org>

Region: UKC22 - Tyneside

Organisation type: Public authority - sub-central government

Contact organisation

Contact Yorkshire Purchasing Organisation for any enquiries.