

Request for Proposal (RFP) – Digital Pallet Management Platform (Americas/SaaS)

Issued by: Equipment Management Solutions Group Ltd
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1. Executive Summary

Equipment Management Solutions Group Ltd invites qualified software design and development partners to submit proposals for the expansion and enhancement of our existing PalletPortal platform. This project will extend our current UK and European pallet management capabilities to include North and South American markets while helping us transition the platform to a comprehensive SaaS delivery model.

The successful vendor will be responsible for developing new modular platform extensions, conducting API discovery and integration with American pooler systems, managing transition and hosting for our existing platform and codebase, and providing ongoing support for the enhanced platform.

2. Background

Equipment Management Solutions Group Ltd is a leading provider of pallet management services across the UK, Europe, and internationally. We leverage technology to optimise pallet operations for our clients, reducing costs and improving supply chain efficiency.

To address growth opportunities in the Americas and to create a scalable SaaS offering, we are initiating this project to extend our existing platform.

The outcome will be a system of new modules designed specifically for the Americas market, capable of functioning within a SaaS offering, as well as discovery and prototyping for direct API integration with third-party Pooler APIs. These modules will be built using our existing technology stack to maintain operational consistency but will be architected and delivered as distinct new capabilities within the system.

3. Project Objectives

3.1. Primary Goals

- **Geographic Expansion:** Extend platform capabilities to support poolers in US, Canada, and South American markets.
- **SaaS Enhancement:** Develop an implementation plan for our SaaS rollout, then define and build out appropriate functionality as determined by the project team
- **Pooler Integrations:** Research and prototype both document-based and API-based integrations with American pooler systems (CHEP, PECO, iGPS), developing and deploying appropriate solutions based on the findings.
- **Scalability:** Develop plans and processes to facilitate growth at scale across the Americas, balancing scale and burst capacity with direct hosting and cloud services costs at each stage during our ambitious growth plans.
- **Hosting Transition:** Migrate hosting responsibilities while maintaining service continuity, and replicating our sophisticated self-healing hosting infrastructure on AWS
- **Codebase Transition:** Adopt and support our existing codebase to accommodate faster integration with the new modules.

3.2. Success Criteria

- Collaborative process definition, scoping, design and development for integration with three American pooler systems.
- Zero-downtime hosting transition, replicating our multi-pod self-healing K8s hosting environment.
- Defining our approach and rollout of a scalable architecture capable of onboarding and supporting teams from some of the world's largest manufacturers and retailers. supporting 6,000+ concurrent users.
- Offering assistance and adaptations to comply with regional data protection regulations.
- Maintaining an excellent standard of user experience across all geographic variants while tailoring UI to the specific needs of each, where necessary.

4. Scope of Work

4.1. Modular Platform Extensions

4.1.1 Americas Market Modules

- Develop new modules within the existing platform architecture for US, Canadian, and South American markets.
- Ensure modules are self-contained yet fully integrated with current system.
- Support region-specific pallet types.
- Implement regional compliance and reporting requirements.
- Implement specific workflows, validation rules and algorithms tuned to the needs of each new pooler.
- Implement pooler-specific locations management rulesets, to be determined by the EMS team.
- Develop multi-currency support and implement an EMS-defined approach to currency conversions.

4.1.2 SaaS Architecture Enhancement

- Design an approach to onboarding first customers for PalletPortal's SaaS offering.
- Build appropriate role management and permissions for first customers.
- Work with the team to define and agree an approach to billing and subscription management.
- Implement customer-facing administrative interfaces.

4.2. API Discovery and Integration

4.2.1 Discovery Phase

- Conduct discovery work on API integrations for American pooler systems.
- Engage with pooler organizations to understand integration requirements.
- Feedback on API capabilities, limitations, and data structures.
- Develop integration roadmap, recommendations and technical specifications.

4.2.2 Integration Development

- Apply the learning from Discovery phase to each Pallet Pooler's data import workflow, as agreed by the project team as part of 4.2.1.

4.3. User Interface and Experience

4.3.1 Regional Customisation

- Implement Americas-specific dashboard views and navigation.
- Maintain consistent UI/UX with existing platform.
- Add multi-currency support for currencies handled by the three new poolers.

4.4. Hosting and Infrastructure

4.4.1 Hosting Transition

- Assume full hosting responsibilities from incumbent provider.
- Replicate existing hosting setup and performance characteristics.
- Ensure seamless migration with zero downtime.
- Maintain or exceed current SLAs.

4.4.2 Infrastructure Requirements

- Implement scalable cloud infrastructure (AWS/Azure/GCP).
- Establish automated backup and disaster recovery protocols.
- Configure monitoring, alerting, and performance optimisation.
- Recommend and implement an appropriate content delivery and load balancing approach to balance hosting costs with performance.

4.5. Security and Compliance

4.5.1 Data Protection

- Maintain GDPR compliance for European data, as directed by the EMS team
- Implement CCPA compliance for US data, as directed by the EMS team
- Ensure appropriate data residency and sovereignty requirements, as directed by the EMS team
- Maintain HTTPS, data encryption at rest and in transit, and SSO via Microsoft or Google, (to include multi-factor authentication).

4.5.2 Security Standards

- Implement appropriate security practices
- Offer a pattern of regular security audits and vulnerability assessments.
- Establish incident response and breach notification procedures.

5. Technical Requirements

5.1 Technology Stack

- **Requirement:** Must utilise existing technology stack (details provided under NDA).
- **Database:** Extend existing schema without major restructuring.
- **API Integrations:** To be defined based on the poolers' requirements
- **Security:** Maintain existing security standards and protocols and offer improvements where appropriate.

5.2 Performance Requirements

- Offer hosting scalability that can grow to support 1000s of concurrent users with minimal latency.
- Page response times under 2 seconds for 95% of requests.
- Database query optimisation for Americas data integration.
- Scalable architecture supporting future growth.

5.3 Integration Requirements

- Seamless integration with existing UK/European systems.
- Fast synchronisation capabilities.
- Robust error handling and retry mechanisms.

6. Deliverables

6.1 Development Deliverables

- **Americas Market Process Integrations:** Complete modular extensions for 3 poolers across North and South American markets.
- **API Integrations:** Research and requirements definition for minimum three American pooler systems, with implementation based on findings.
- **Enhanced UI/UX:** Tuned dashboard and user interfaces with regional customisation.
- **SaaS Architecture:** Multi-tenant customer onboarding processes that balance hosting cost and value.

6.2 Documentation Deliverables

- API Discovery Report: documentation of pooler system integrations.

6.3 Maintenance, Support and Training Deliverables

- **User Training:** Knowledge transfer for EMS team.
- **Technical Training:** Knowledge transfer for internal technical team.
- **Maintenance:** Vendors must provide support post go-live, including incident management and bug fixes.

7. Vendor Requirements

7.1 Essential Experience and Qualifications

- **Experience:** Minimum 10 years in enterprise SaaS development and API integrations.
- **Logistics Expertise:** Demonstrated experience in supply chain or logistics systems.
- **Hosting Capability:** Proven track record in managed hosting and cloud infrastructure.
- **Team:** Dedicated project team with relevant technical expertise.

7.2 Preferred Experience and Qualifications

- Previous experience with pallet management or pooler systems.
- Certifications or extensive experience in relevant cloud platforms (AWS, Azure, GCP).
- Experience with multi-tenant SaaS architectures.
- Track record of successful hosting migrations for global brands.
- Track record of successful hosting migrations for highly sensitive commercial data.
- Experience of delivering applications with country-specific data sovereignty requirements.

8. Proposal Requirements

8.1 Proposal Structure

Submissions must include the following:

- An outline of the proposed approach and methodology.
- Approach to API discovery.
- Project timeline with detailed milestones.
- Detailed budget and pricing structure in GBP.
- Resourcing plan, including team structure and key personnel.
- References and relevant case studies.

8.2 Additional Requirements

- All costs must be provided in GBP.
- Proposals must remain valid for 90 days.

9. Evaluation Criteria

Proposals will be evaluated using the following weighted criteria:

9.1 Technical Solution Quality (40%)

- Alignment with EMS's existing technology stack.
- Proposed hosting platform alignment with PalletPortal's infrastructure requirements.
- Platform scalability, and performance to facilitate Americas growth.
- Approach to onboarding new poolers, using EMS' internal team's expertise to define new algorithms, modifications and enhancements for new poolers.
- Security and compliance capabilities and experience
- Approach to API discovery for real-time data synchronisation.

9.2 Vendor Expertise & Delivery Capability (25%)

- Demonstrated experience in SaaS development and logistics/supply chain systems.
- Track record of API integrations with third-party platforms.
- Strength and availability of the proposed project team.
- Relevant experience in dealing with multi-jurisdictional hosting requirements
- Relevant experience in dealing with specialised hosting and data requirement (data sovereignty, platform flexibility, data sensitivity).

9.3 Implementation Approach & Risk Management (15%)

- Clarity and realism of project plan, milestones, and timelines.
- Proposed methodology (e.g., agile, phased rollout, testing).
- Identification and mitigation of risks (technical, operational, compliance).
- Change management and stakeholder engagement approach.

9.4 Commercials and Value (15%)

- Cost competitiveness and transparency of pricing structure.
- Value for money (total cost of ownership, not just initial bid).
- Flexibility in pricing/payment models.

9.5 Support & Maintenance (5%)

- Post-go-live support structure, including SLA approach, and availability for Americas users.
- Long-term SaaS maintenance and upgrade approach.

10. Timeline and Milestones

10.1 Procurement Schedule

- RFP Issued: 10 October 2025.
- Pre-Bid Conference (Optional): 17 October 2025.
- Deadline for Questions and Clarifications: 24 October 2025.
- Responses to Questions: 31 October 2025.
- Proposal Submission Deadline: 14 November 2025.
- Vendor Selection & Award: 21 November 2025.

10.2 Project Delivery Milestones

- Q4 2025 – Q2 2026.

11. Submission Process

11.1 Submission Requirements

- **Deadline:** 14 November 2025.
- **Method:** Email to cl@ems-pm.com with subject line "RFP Response - PalletPortal Americas [Company Name]".

11.2 Pre-Submission Activities

- **NDA Requirement:** All bidders must execute NDA to access detailed system documentation.
- **Pre-bid Conference:** Optional conference call on 17 October 2025.

11.3 Questions and Clarifications

- **Deadline:** 24 October 2025.
- **Method:** Email to cl@ems-pm.com with subject line "RFP Question - PalletPortal Americas".
- **Response:** Responses shared with all bidders by 31 October 2025.

12. Terms and Conditions

12.1 Proposal Conditions

- Proposals must remain valid for 90 days from submission deadline.
- EMS reserves the right to reject any or all proposals without explanation.
- EMS reserves the right to negotiate with multiple vendors.
- No commitment to proceed with project until contract execution.

12.2 Intellectual Property

- All deliverables, including code, integrations, and documentation, developed under this contract will be the sole property of EMS.
- Vendors may retain ownership of generic frameworks and tools not specific to EMS, but EMS will have a perpetual, royalty-free license to use them within the PalletPortal platform.

12.3 Confidentiality and Data Protection

- All bidders must execute NDA before accessing confidential information.
- Bidders must maintain confidentiality of all RFP-related information.
- GDPR compliance required for all proposal-related data processing.

13. Contact Information

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14. Appendices

Appendix A: Evaluation Scoring Matrix