



# Preliminary market engagement checklist

This learning aid is designed to be a list of considerations you should take when undertaking preliminary market engagement, this includes requirements under the Procurement Act 2023 and aspects of best practice.

## Action

1. Check Register of Commercial Tools for any existing frameworks or dynamic markets that you could use as your route to market
2. Check central digital platform for supplier performance data and spend for that category to obtain greater understanding of current suppliers to the public sector, understand any performance issues or trends and level of spend
3. Use any available market analysis tools or software to understand current market conditions and identify market leaders, new entrants, SMEs, VCSEs
4. Consider who you want to engage with or encourage to participate (have regard to SMEs, VCSEs etc)
5. Consider how you will engage with the market (questionnaire, supplier day, meetings etc)
6. Develop any necessary documentation or make arrangements for engagement (ensuring it is easily accessible and fit for purpose)
7. Publish preliminary market engagement notice

8. Consider other means of advertising (using own e-procurement system / web page / specialist publications if necessary etc) - **preliminary market engagement notice must be published first**
9. Undertake engagement and record minutes or key findings
10. Collate and review any relevant information or findings from the engagement to develop your procurement strategy
11. Identify information which can be shared as part of the tender process where relevant and obtained for audit trail purposes